Introducing Investor Connect®

The information that matters most to you, within secure and easy reach

Be confident that you know exactly where you stand—every day

Investor Connect® is a simple and secure website that allows you to stay up-to-date on the information that matters most to you—information that will give you greater control and valuable insights. With access to your account and relevant market data[1], you'll have timely information at your fingertips to make well-informed investment decisions and work even more closely with your financial professional.

View your financial information with greater control

Here are some of the types of information you can access easily wherever you have internet access, including your smart phone.

Account information[2]

- Holdings, including cost basis
- Transaction details
- Gain/loss information
- Year-to-date income
- Cash and money market balances
- Open orders
- A visual snapshot of your equity and mutual fund holdings via the Heatmap

Mobile app

Our mobile app is designed to provide you with freedom, flexibility and secure on-the-go access to information and tools that may help enhance your client experience. Available for your iPhone, iPad or Android device, the RBC Connect app is free on the App Store® or Google Play™. The app allows you to view your accounts, access market data, deposit checks into eligible accounts and call your financial professional at the touch of a button.

Online documents

View your financial documents wherever you have internet access. You'll find a full archive going back several months, even years, for most types of documents.

You can also control which documents you receive in the mail from us, by selecting "Go Paperless." Once your documents are available, you'll receive an email linking you directly to the website. Print and save the documents at your convenience and reduce the risk of fraud and identity theft that may come with mailed documents.

- Account statements
- Trade and non-trade confirmations
- Tax documents
- Proxies and reorganization notices
- Mutual fund prospectuses
- Annual statements

Service providers

- Download information about your transactions, balances and positions into your Intuit® Quicken® and/or TurboTax® software.
- Make well-informed budgeting decisions and simplify your tax return preparations.

Gain valuable insights and take control using the investor center

The Investor Center features tools you can use to evaluate options and choices, so you have full confidence in your investment decisions.

Markets

- Get current up-to-the-minute info about world markets, including market overviews, indices, and today's market movers.
- Explore the details about companies and mutual funds that interest you.
- View breaking news and insights from industry experts.

Stock watch

- Create up to 10 distinct lists and decide which symbols you'd like to track.
- In one table, you'll see a snapshot for each symbol with volume, EPS, P/E ratio, 52-week range, and more.

Hypothetical holdings

- Continue to sharpen your investment know-how by creating virtual portfolios to track market prices, values, and unrealized gain or loss info for stocks and funds you're interested in.
- Create several portfolios and even base them on your existing accounts—here or elsewhere.

Alerts

- Choose to receive email alerts and you'll have insight into the symbols you're tracking, no matter where you are.

Calculators

- Watch the progress on reaching your goals for retirement, investments and savings, insurance or other goals like savings with easy-to-use calculators.

Self-service

Account owners can update their address, add an address and specify what account information (if any) to have mailed to each address. Account owners can also move cash between eligible accounts. E-mail confirmations are sent when an address change or fund transfer is requested, as well as when the fund transfer request is either completed, canceled or rejected.

Privacy and security

We are committed to providing you with a secure online experience. Protecting your information and safeguarding you from fraud are among our highest priorities. In addition to our stringent privacy practices, we employ a diverse range of current technologies and security mechanisms to ensure the safety, confidentiality and integrity of your information and transactions.

Your business remains just that—your business.

If you need help

If you have technical or functional questions about this site, call Client Support Services, toll-free at: 1 (800) 933-9946 weekdays from 8 a.m. to 10 p.m. ET and Saturday from 10 a.m. to 6 p.m. ET.

If you have any investment questions, please contact your financial professional.

Insight and control made simple—and secure.

Take a tour

Go to www.investor-connect.com, choose "Take a tour," and see how simple it is to have powerful and insightful information at your fingertips.

Register quickly and easily

Gather the account numbers of the accounts you'd like to view online. Go to www.investor-connect.com, click "Register now" and follow the prompts.

Access to most account types will be available immediately.[3]

1. Market information and the value of your accounts are delayed approximately 20 minutes.
2. For complete account information, refer to your account statement(s), trade confirmation(s), and open order notice(s).
3. Based on the type of account or account ownership. Some account types may require additional validation.

RBC Clearing and Custody, a division of RBC Capital Markets, LLC, Member NYSE/FINRA/SIPC, may provide clearing and execution services for your Broker-Dealer. The referenced product and/or service is made available through that relationship.

0509-CS (05/20)