

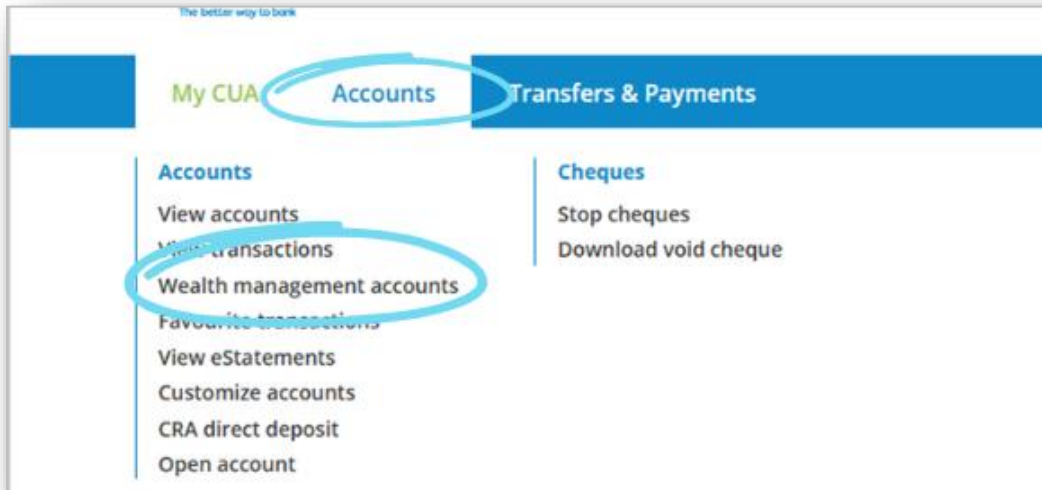
MEMBER INFORMATION GUIDE – AVISO WEALTH ACCOUNTS

Table of Contents

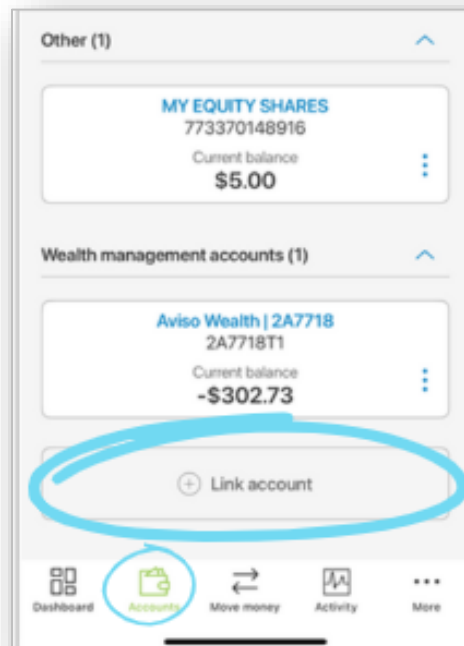
Link Your Aviso Wealth Management Accounts.....	2
Disconnect Your Aviso Wealth Management Accounts	9

HOW TO LINK YOUR AVISO WEALTH MANAGEMENT ACCOUNTS

1. Begin by hovering your mouse over the 'Accounts' tab along the menu bar and select 'Wealth management accounts'.



If you are using the mobile app, click the 'Accounts' icon at the bottom of the screen and scroll down to the Wealth management accounts section and click the '+ Link Accounts' button.



2. Click the 'Link Account' button to continue.

Wealth management accounts

Get a more complete picture of your finances. Link your accounts from our service partners to view transaction history, balances, and account details.

[Sign in to Aviso](#)[Link Account](#)



You can link your investment accounts here anytime

Here you can have one or more investment accounts linked to your profile at your convenience

CUA Credit union and Aviso Financial Inc. are separate legal entities. By proceeding to link your account, you acknowledge and agree that Aviso Financial Inc. will share your account information with CUA Credit union for the purpose of showing your Aviso Financial Inc. account information on your CUA Credit union digital banking platforms. Your information will at all times be handled in accordance with the privacy policies of CUA Credit union and Aviso Financial Inc., and applicable laws.

← Link wealth management account

Get a more complete picture of your finances. Link your accounts from our service partners to view transaction history, balances, and account details.



You can link your investment accounts here anytime

Here you can have one or more investment accounts linked to your profile at your convenience

CUA and Aviso Financial Inc. are separate legal entities. By proceeding to link your account, you acknowledge and agree that Aviso Financial Inc. will share your account information with CUA for the purpose of showing your Aviso Financial Inc. account information on the CUA digital banking platforms. Your information will at all times be handled in accordance with the privacy policies of CUA and Aviso Financial Inc., and applicable laws.

[Link account](#)[Sign in to Aviso](#)

3. Select the type of Aviso account you want to link by clicking the arrow to the right of the name.
- **Aviso Wealth** – Members who have accounts with Credit Union Financial Management (CUFM) or who deal with another Aviso financial advisor.
 - **Qtrade Investor** -- Members who have accounts with the self-directed brokerage offered through the Qtrade Digital Wealth platform.
 - **Qtrade Guided Portfolios** -- Members who have a guided portfolio through the Qtrade Digital Wealth platform.

Link wealth management accounts

Select a product

 Aviso Wealth	
 Qtrade Investor	
 Qtrade Guided Portfolios	

CUA Credit union and Aviso Financial Inc. are separate legal entities. By proceeding to link your account, you acknowledge and agree that Aviso Financial Inc. will share your account information with CUA Credit union for the purpose of showing your Aviso Financial Inc. account information on your CUA Credit union digital banking platforms. Your information will at all times be handled in accordance with the privacy policies of CUA Credit union and Aviso Financial Inc., and applicable laws.

[Cancel](#)

4. On the account details page, you will see your date of birth is automatically populated. **1)** Enter your Aviso Client ID # which is found on your investment account statement. Next, **2)** Enter your last name and **3)** postal code. **4)** Select 'Continue'.

For added security, we have pre-populated the date of birth with the information we have on file for you. If this date is incorrect, please contact us for assistance.

Client ID #	2A7718
Last name	Doe
Postal code	V7M1A1
Date of birth	Jul 07, 1960

CUA Credit union and Aviso Financial Inc. are separate legal entities. By proceeding to link your account, you acknowledge and agree that Aviso Financial Inc. will share your account information with CUA Credit union for the purpose of showing your Aviso Financial Inc. account information on your CUA Credit union digital banking platforms. Your information will at all times be handled in accordance with the privacy policies of CUA Credit union and Aviso Financial Inc., and applicable laws.

Cancel

Continue

- Next, confirm your details. To make changes select 'Back'. To confirm your information is correct, select 'Continue'.

Link wealth management accounts

DetailsConfirmCompleted

Get a more complete picture of your finances. Link your accounts from our service partners to view transaction history, balances, and account details.

Confirm details

Aviso Wealth details

Client ID #	2A7718
Last name	Doe
Postal code	V7M1A1
Date of birth	Jul 07, 1960

Cancel

Back

Continue

6. To authorize these changes, you will be asked to enter a one-time authentication code. You can choose to have this code sent to your email or texted to the mobile phone number associated with your account. Once you have received your code, enter it in the appropriate box and select 'Continue'.

Link wealth management accounts

DetailsConfirmCompleted

Get a more complete picture of your finances. Link your accounts from our service partners to view transaction history, balances, and account details.

This transaction requires authentication.

Confirmation code

Text message

A text message with the authentication code has been sent to your phone XXX.XXX.X899. Enter in the code you have received.

Enter code

If you don't receive the text message within 10 minutes, [resend the code](#).

Cancel

Back

Continue

7. Congratulations! Your wealth management account has been successfully linked. You now have the option to print or export the page for your records.

✓

Your investment is now linked


Print


Export


Navigate to

Aviso Wealth details

Client ID #	2A7718
Last name	Doe
Postal code	V7M1A1
Date of birth	Jul 07, 1960

Confirmation details

Confirmation number	265138a1-f366-4475-bad8-fda010876f22
---------------------	--------------------------------------

If you are using the mobile app, click the Share icon and then select **1)** 'See PDF' to access a printable version or **2)** 'Share' to export the confirmation.

Link wealth management account

✓ Your investment is now linked


Share

Link wealth management account


Share

CUA and Aviso Financial Inc. are separate legal entities. By proceeding to link your account, you acknowledge and agree that Aviso Financial Inc. will share your account information with CUA for the purpose of showing your Aviso Financial Inc. account information on the CUA digital banking platforms. Your information will at all times be handled in accordance with the privacy policies of CUA and Aviso Financial Inc., and applicable laws.

Done

[View details](#)

Share

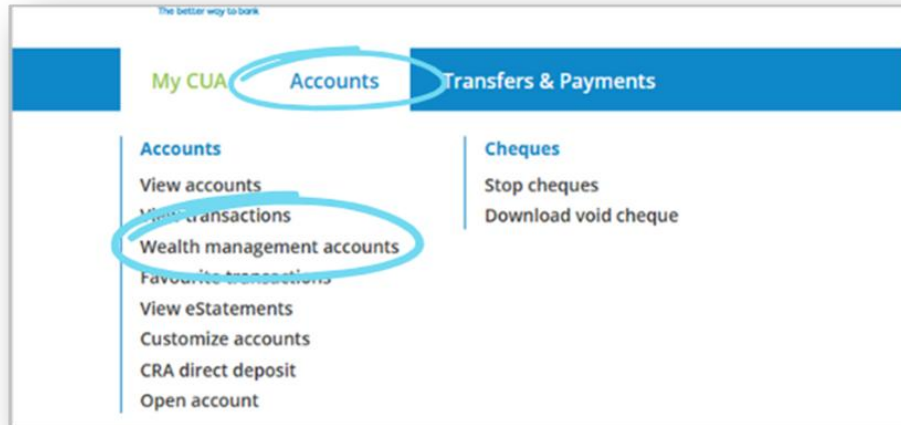


 See PDF

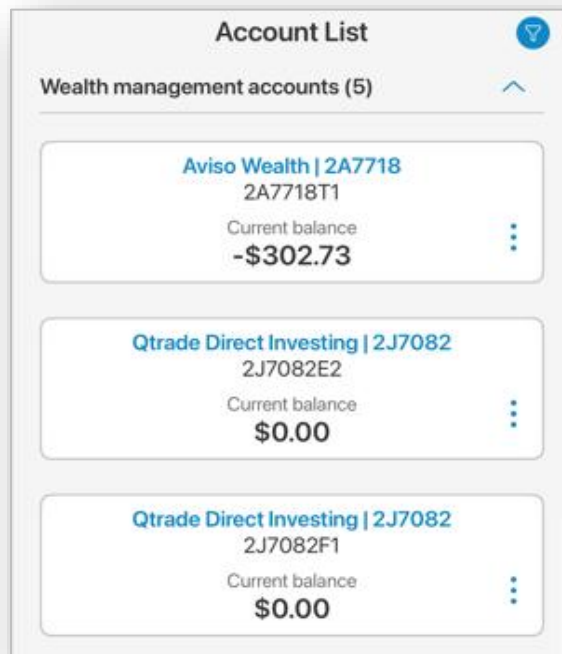
 Share

HOW TO DISCONNECT YOUR AVISO WEALTH MANAGEMENT ACCOUNTS

1. Begin by hovering your mouse over the 'Accounts' tab along the menu bar and select 'Wealth management accounts'.



If you are using the mobile app, click the 'Accounts' icon at the bottom of the screen and scroll down to the Wealth management accounts section.

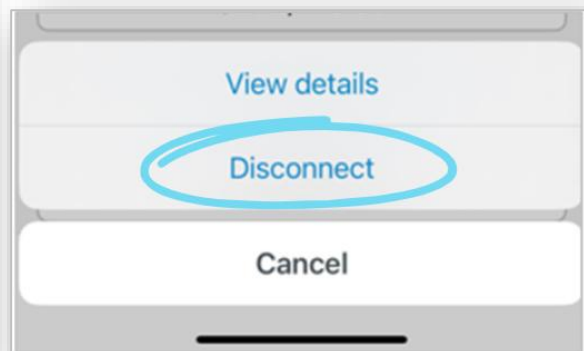


- Next, click the red trash can icons next to any one of the accounts listed under the linked Client ID. This will remove all accounts related to the portfolio.

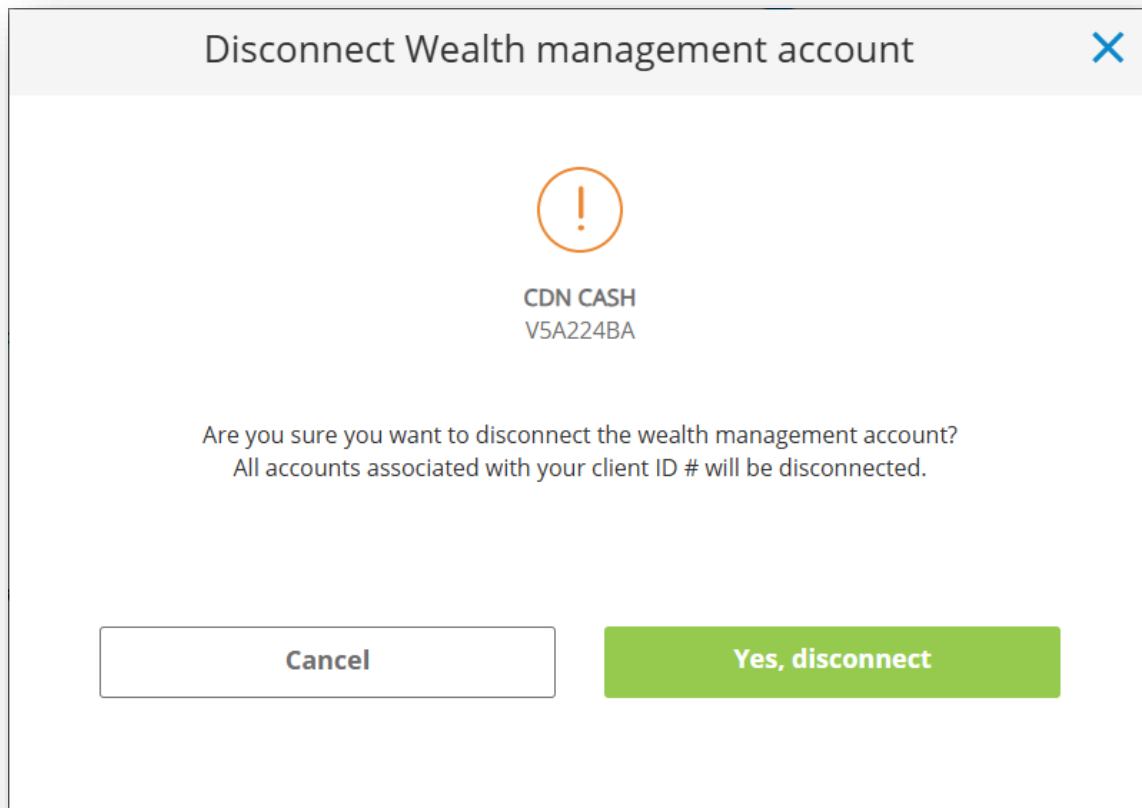
Aviso Wealth 2A7718				
	SPLRIF 2A7718T1	Cash balance -\$302.73	Market value \$0.00	 
Qtrade Guided Portfolio V222AJ				
	CDN CASH V5A224BA	Cash balance \$4,615.37	Market value \$258,163.18	 
	CDN CASH V5A22FRA	Cash balance \$12,917.48	Market value \$91,701.12	 

If you are using the mobile app, click the three dots at the right of an account under the portfolio, then select 'Disconnect'.

Account List		
Wealth management accounts (5)		
Aviso Wealth 2A7718 2A7718T1	Current balance -\$302.73	
Qtrade Direct Investing 2J7082 2J7082E2	Current balance \$0.00	
Qtrade Direct Investing 2J7082 2J7082F1	Current balance \$0.00	



3. Click 'Yes, disconnect' to confirm you want to remove all accounts associated with the Client ID.



4. Congratulations! The accounts associated with the Client ID have been disconnected and will no longer appear in the account list. Disconnected accounts can be re-linked at any time if you choose.