

Account Funding Page – Qtrade Guided Portfolios

How To:

1. Link your banking information
2. Set up PAC for scheduled funding of the account
3. Transfer your existing myCoastal or Coastal Community account to your new Qtrade Guided Portfolios account
4. Denote bill payment account info and instructions to make easy, one-off contributions from your online banking

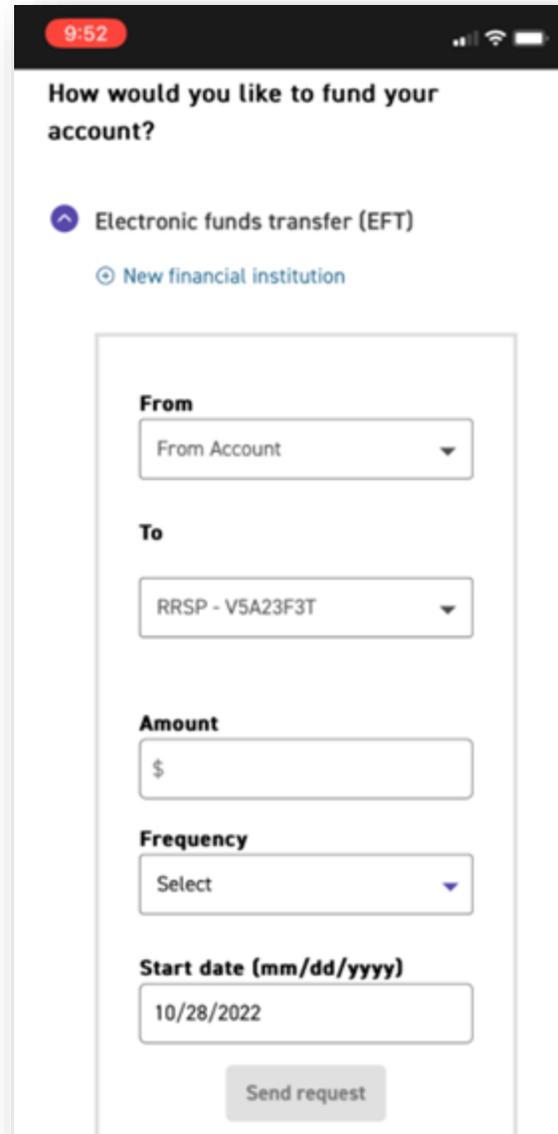
Step 1: Link your banking information

- Take a picture of your void cheque
- OR upload a PDF of your pre-authorized debit form
- NOTE: you cannot take a picture of a pre-authorized debit form, it will be rejected.
- Your banking information is all set up!

The screenshot shows a mobile app interface for linking banking information. At the top, there is a status bar with the time 9:51 and signal, Wi-Fi, and battery icons. Below that, there is a header with a 'VOID' stamp and the text 'VOID COUNTER CHEQUE' and 'EXAMPLE'. The main content area contains 'Important tips to avoid delays' with four bullet points: a green checkmark for 'Take the photo in a well-lit area for a clear picture', a green checkmark for 'The image must clearly show your name and account number', a red X for 'If you have downloaded an electronic void cheque, upload in the original PDF format only. Do not upload photo, scan or screenshot.', and a red X for 'Blank counter cheques, corporate and third-party cheques are not allowed'. Below the tips, there is a section for 'Institution name' with a text input field containing 'Financial Institution'. Underneath is a section for 'Upload a void cheque' with a 'Choose file' button and a cloud upload icon. At the bottom, there is a 'Submit' button.

Step 2: Set up your scheduled contributions

- Select the banking information you just set up as your "From Account"
- "To Account" is defaulted to the account you are opening
- Amount is the contribution amount you are scheduling
- Frequency is:
 - Monthly
 - Bi-weekly
 - Weekly
 - Or Other
- Select the start date
- Click "Send request"
- You will need to review the Automated Deposit Agreement and select "I Agree"
- Your scheduled contributions are all set up! Congratulations! 🎉



9:52

How would you like to fund your account?

Electronic funds transfer (EFT)

New financial institution

From

From Account

To

RRSP - V5A23F3T

Amount

\$

Frequency

Select

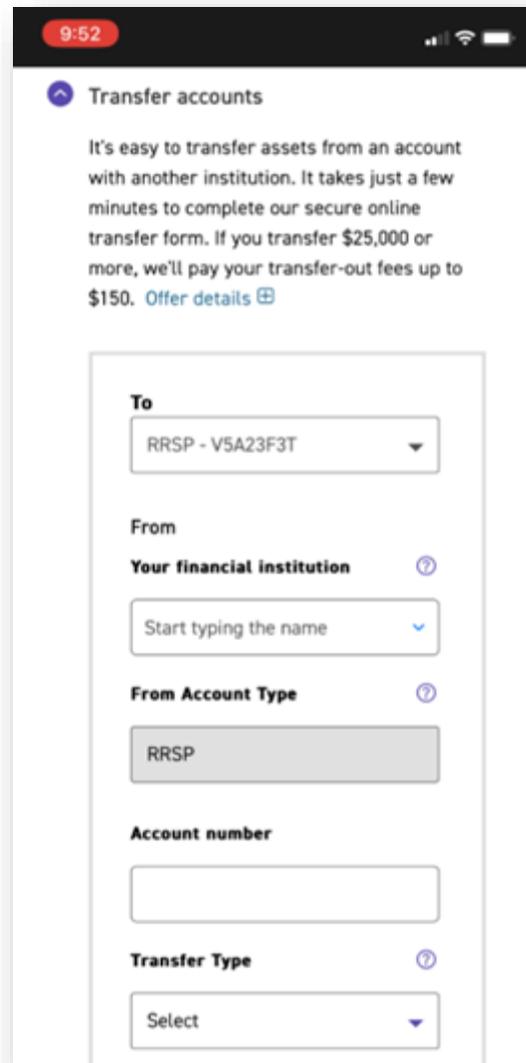
Start date (mm/dd/yyyy)

10/28/2022

Send request

Step 3: Initiate your transfer of funds from myCoastal, CCCU or another institution

- "To Account" is defaulted to the account you are opening
- "From Account": start typing the name of the financial institution
- For myCoastal accounts, type Manulife and then choose Manulife Financial from the drop-down list
- "From Account Type" is defaulted to the account type you are opening
- Enter the account number at Manulife or the relinquishing institution:
 - RSP, Spousal, Locked in RSP: 20002708
 - TFSA: 41002708
 - NRSP: 40002708
- Transfer type choose "All in Cash"
- Enter the approximate account value
- Upload a PDF or JPG of your statement from Manulife (optional)
- Check the box "I authorize Qtrade Guided Portfolios" box to transfer the funds, read the Account Transfer Client Disclosure and Select "I agree and complete transfer"



9:52

Transfer accounts

It's easy to transfer assets from an account with another institution. It takes just a few minutes to complete our secure online transfer form. If you transfer \$25,000 or more, we'll pay your transfer-out fees up to \$150. [Offer details](#)

To

RRSP - V5A23F3T

From

Your financial institution

Start typing the name

From Account Type

RRSP

Account number

Transfer Type

Select

Step 4: Denoting account number and set up bill payment on your online banking for one-off account funding

- Write down the account number shown in the bill payment option
- Sign into your online banking & choose Add Bill Payee
- Search for Bill Payee: "Qtrade Guided Portfolios"
- If unavailable, you may have to select VirtualWealth as the payee, then enter the account number and select Submit
- You can now make one-off contributions to your Qtrade Guided Portfolios account directly from your bank account through online banking, so easy!

