

## B2B Bank Dealer Services includes:

### B2B Bank Financial Services Inc.

B2B Bank Financial Services Inc. (B2BBFSI) is a mutual fund dealer and a member of the Canadian Investment Regulatory Organization (CIRO), a national self-regulatory organization (SRO) for the Canadian mutual fund industry. As a mutual fund carrying dealer, B2BBFSI provides Canada's licensed mutual fund advisors with a full suite of financial services for their clients.

### B2B Bank Securities Services Inc.

B2B Bank Securities Services Inc. (B2BBSSI) is an investment and carrying dealer and a member of the Canadian Investment Regulatory Organization (CIRO), a national self-regulatory organization that oversees all investment dealers and trading activity on debt and equity markets in Canada. B2BBSSI provides Canada's licensed securities advisors, as well as individual investors, with investment products and services — including the ability to trade and invest in equity and fixed income securities. B2B Bank Securities Services Inc. is a Member of the Canadian Investor Protection Fund (cipf.ca).

### B2B Bank Intermediary Services Inc.

B2B Bank Intermediary Services Inc. (B2BBISI) is a mutual fund dealer, registered with the Autorité des marchés financiers (AMF), the province of Quebec's regulatory body for the financial services sector. As a mutual fund carrying dealer, B2BBISI provides Quebec's licensed mutual fund advisors with a full suite of financial services for their clients.

## When you and your financial advisor choose B2B Bank Dealer Services, you're in good hands.

Our outstanding service complements an extensive array of products and account types to suit your needs. And our established credentials give you peace of mind, so you can focus on growing your portfolio.

For more information about B2B Bank Dealer Services, we invite you to contact your advisor or visit [b2bbank.com/dealerservices](https://b2bbank.com/dealerservices).

B2B Bank Dealer Services includes B2B Bank Financial Services Inc., B2B Bank Securities Services Inc., and B2B Bank Intermediary Services Inc. B2B Bank Financial Services Inc. and B2B Bank Securities Services Inc. are members of the Canadian Investment Regulatory Organization (CIRO) and members of the Canadian Investor Protection Fund (CIPF). B2B Bank Intermediary Services Inc. is operating in Quebec and regulated by the Autorité des marchés financiers (AMF).

# Introduction to B2B Bank Dealer Services



## B2B Bank Dealer Services working for you

At B2B Bank Dealer Services, we want clients to reach their financial goals, and we do this by working with independent advisors and their dealers to provide you with the industry's finest financial products and services.

### Who we are and what we do

B2B Bank Dealer Services is one of Canada's largest carrying dealer organizations, which means we serve the financial advisors and dealers who work for you. Our family of mutual fund and investment dealers provides custody services over account assets and we execute, clear, and settle trades that you and your advisor decide upon. In addition, we keep you informed and up to date with trade confirmations, consolidated statements, tax receipts and more.

B2B Bank Dealer Services has more than 30 years of experience serving Canada's investment community, helping Canadians build and manage their wealth.

Hundreds of thousands of investors like you, and more than 27,000 financial advisors and brokers, choose B2B Bank Dealer Services for their one-stop account solutions.

## What can you expect from B2B Bank Dealer Services?

### Consolidation, convenience and choice

We know that investors like you want to be able to stay current with their accounts and have secure, online access when they need it. B2B Bank Dealer Services provides online tools and resources to help you stay informed about your accounts. In addition, our diverse array of features benefit both you and your advisor.

#### Consolidation

B2B Bank Dealer Services eliminates the headaches of holding your investment accounts at multiple financial institutions with separate reporting from each company. We make it easy for you and your advisor to make informed decisions; we provide you with consolidated statements that include all of your important investment information. You may choose to receive these periodic statements by mail or you can visit us online to retrieve your account information, which is updated daily.

#### Convenience

B2B Bank Dealer Services Investor Access provides convenient and secure online access to all of your important account information, so you and your financial advisor can work together to maximize your savings and investment strategies. With Investor Access, you can:

- View your account holdings, balances and transaction history.
- Access contribution tax receipts, information on distributions and dividends and track capital gains.
- View and print copies of receipts and previous statements.
- View the details of your pre-authorized purchases.

You can make prompt and easy online banking deposits to your account using your bank's bill payment functions.

Sign-up for eDelivery of your statements, trade confirmations and tax slips. These documents will be archived for you to access and view, free, for 7 years.

#### Choice

We offer plans to meet every financial need, including:

- Non-registered Investment Accounts
- Tax-Free Savings Accounts (TFSA's)
- Registered Retirement Savings Plans (RRSP's) and locked-in retirement accounts
- Registered Retirement Income Funds (RRIF's) and locked-in income fund accounts
- Deferred Profit Sharing Plans (DPSP's)
- Individual Pension Plans (IPPs)

#### Access to a variety of products and services

With an account through B2B Bank Dealer Services, your advisor can draw on a wide selection of investments and other financial products, including:

- Thousands of Canadian-dollar mutual funds
- Publicly traded securities listed on the TSX, TSX Ventures Exchange, NYSE, AMEX, NASDAQ and other markets and exchanges\*
- Non-exempt fixed income (corporate and indexed bonds)\*
- Exempt fixed income (i.e., government and provincial bonds)
- High interest investment and deposit products

\*Available only through B2B Bank Securities Services Inc.

At B2B Bank, we also offer investment and RSP loans, mortgages, deposits and banking services. Speak with your advisor to learn more!