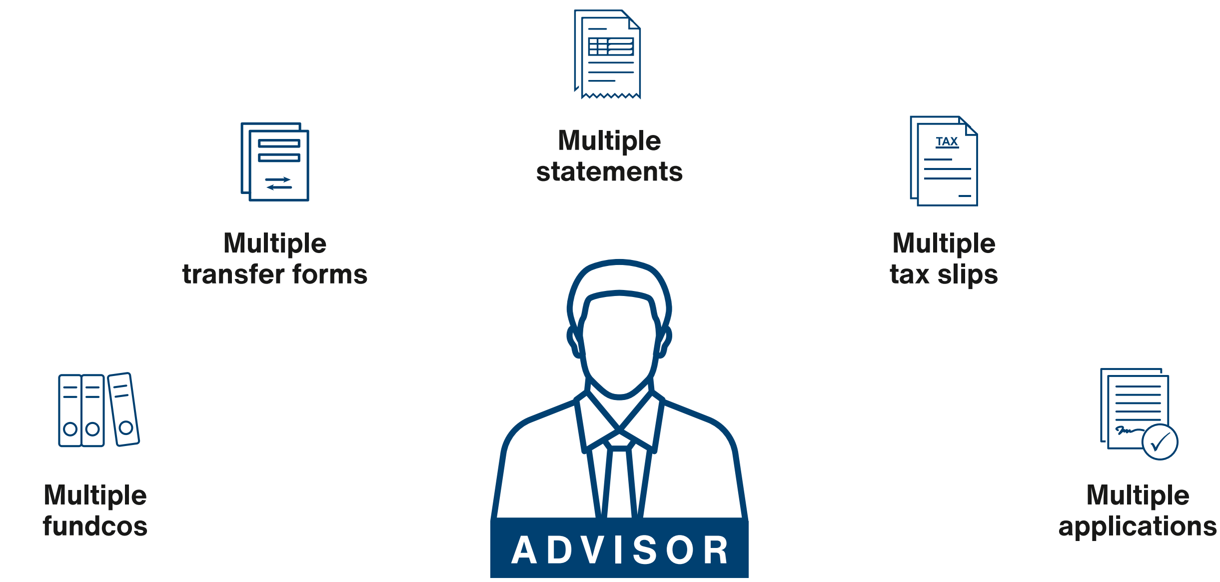
Helping you streamline your business

Thinking of transferring from a client name to a nominee model? Take advantage of our Welcome In Program (WIP).

B2B Bank Dealer Services helps with the transfer from client name to nominee by waiving clients' annual account fees (applicable for their first year and for new accounts).[1]

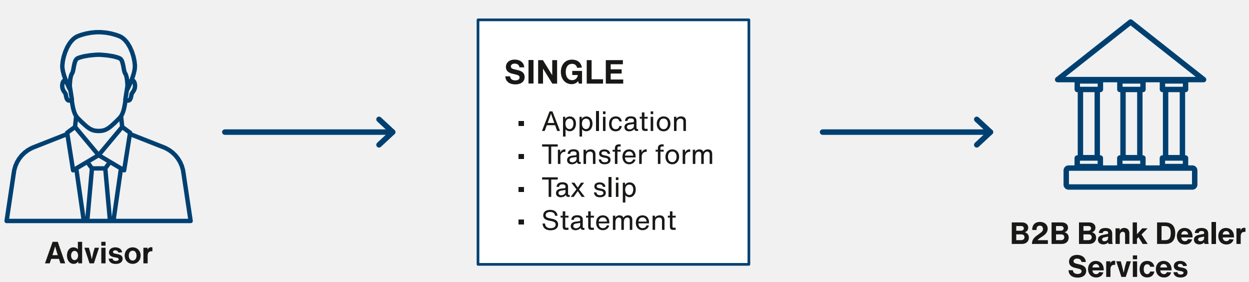
Without B2B Bank Dealer Services:
Client name model



With B2B Bank Dealer Services:

B2B Bank Dealer Services can help you spend less time on administrative tasks and consolidate your client name holdings to better serve your clients.

Talk to your **Business Development Manager (BDM)** today about how a nominee account can offer you flexibility, convenience, and help you **streamline your business** for one simple fee.



B2B BANK DEALER SERVICES

HELPING YOU STREAMLINE YOUR BUSINESS

Are you spending your time efficiently?

B2B Bank Dealer Services can help you streamline your business so you can focus on what really matters – the success of your practice, and the success of your clients.

Our Investment Accounts offer a variety of features and benefits over client name accounts by:

- ✓ Eliminating the need to learn the various systems and processes for each fund company or service provider
- ✓ Consolidating portfolio and tax reporting
- ✓ Relying on one direct relationship with a single financial institution
- ✓ Having access to a dedicated Business Development Manager (BDM)
- ✓ Freeing up your time to focus on your clients, and grow your business

We can help you run your business more efficiently with:

- ✓ The convenience of all assets in one account
- ✓ Faster trading: prompt transfer of money from one fund company to another
- ✓ A single transfer form and signature to make transfers of assets faster and more efficient
- ✓ A consolidated statement that reports on all your clients' assets held with us
- ✓ Advisor Access: a secure online portal for advisors and investors, offering tools to improve the efficiency of your practice

Reduce costs for you and your clients

NEW! Portfolio Manager Transition Service offers a seamless transfer of accounts between B2B Bank Dealer Services and Laurentian Bank Securities. Specialized service for CIRO/ AMF dealers/advisors transitioning to Portfolio Manager at no cost to you. In addition, it allows you to lean on our experience as you evolve your business. Our knowledgeable team of subject matter experts, our existing relationships with regulators and standardized approach can guide you through the process to become a Portfolio Manager.

Transfer-in Program: offers financial incentives of up to $175 per account to transition to B2B Bank Dealer Services.[2]

Talk to your BDM today

If you're interested in learning how B2B Bank Dealer Services can help you streamline your business, talk to your Business Development Manager, call Client Services at **1-800-387-2087** or visit **b2bbank.com/dealerservices.**

1. Exceptions may apply. 2. Some conditions apply - for full details speak to your Business Development Manager or refer to our fee schedule that can be found on 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). B2B Bank Dealer Services does not endorse or promote any investments products, programs and strategies. B2B Bank Dealer Services does not endorse or promote any investments products, programs and strategies. This document is intended for licensed financial advisors exclusively and is for information purposes only.