

The value of our services

B2B Bank Dealer Services is one of Canada's largest carrying dealer organizations, providing account administration, clearing and settlement, and reporting services to over 27,000 independent advisors and 300,000 individual investors across the country.



Peace of mind

More than 30 years of experience serving Canada's investment community.



Consolidated account

Consolidate your client's holdings and reduce the need for multiple statements and tax slips.



Online access

Use our secure Advisor Access tool to help you manage your clients' accounts.



Account choice

A wide range of registered and non-registered account types to choose from.



One contact

Relying on one direct relationship with a single financial institution.

B2B Bank Dealer Services specializes in simplified account administration, trade and transaction processing, account management and reporting for a simple fee¹.

In addition to a wide range of account types, we deliver value-added services today's investors demand:

- Group plan services
- Account transfer assistance
- Fee for service option
- Discount brokerage²

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/dealservices**.

¹Some conditions apply – for full details, refer to our fee schedule that can be found on b2bbank.com/dealerservices. ²Available only through B2B Bank Securities Services Inc. 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 nor promote any investment products, programs or strategies. This document is intended for licensed financial advisors exclusively and is for information purposes only. B2B Bank is a trademark used under license.

