Sign up for **Investor Access**

Online account information at your finger tips.

View summaries of your account, tax receipts, statements, trade confirmations and investments:

- Go to b2bbank.com/dealerservices. Click on Sign In > Investor Access and select Register from the left-hand menu.
- Select the Step 1 tab, enter your Registration ID (found on your account statement) and Account Number. A Registration PIN will be mailed to you.
- Once you receive your Registration PIN in the mail, return to the online registration page, select the Step 2 tab and enter your Registration ID and PIN; click Submit.
- Enter your name and email address. Create a confidential password and select security questions and answers.
- Read the Conditions of Use and agree by clicking Submit
- Note your new User ID and remember your new password. On the Sign In page, enter your User ID and newly-created password.

Where can I find my Registration ID and Account Number?

Look on your account statement (above market value summary)





About Investor Access

B2B Bank® Dealer Services Investor Access provides convenient and secure online access to all of your important account information.

- 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 investments and withdrawals

You can also 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.

With Investor Access, you have up-to-date information on all of your accounts and investments so you and your financial advisor can focus on maximizing your savings and investment strategies.

For more information about how Investor Access can help you keep track of your investments, please speak with your financial advisor or call Client Services at 1.800.387.2087.

Register today!

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