


How does a bank  
that serves advisors  
work for you?



A man with dark hair and a beard, wearing a bright yellow jacket, is shown in profile, smiling and looking towards the right. In the background, a woman with dark hair is smiling and looking down at something in her hands. The background is slightly blurred, showing what appears to be a workshop or office setting with some equipment.

By giving you  
a choice.

Working with **your advisor** to  
bring **solutions** to **you**.

# Welcome to B2B Bank.

B2B Bank is unique. While we offer many of the same products as the other banks – everything from investment and RSP loans to mortgages, banking services and investment accounts – you probably haven't heard of us. But your financial advisor has. B2B Bank is different from other banks. We give Canadians a choice. Where other banks have their own advisors, we serve **independent** advisors who are able to offer you **unbiased** advice and financial solutions that are appropriate for your individual needs.





# It's important for Canadians to have **independent financial advice**

B2B Bank is proudly 100% Canadian, and we have an independent spirit – much like the advisors we work with. We're dedicated to you and your advisor because we strongly believe that all Canadians should have access to independent financial advice.

So, while we don't sell our banking services directly to you like other banks – we work hard so your advisor can offer you the products and services you need to reach your financial goals.



# Our history

Our roots run deep in the financial industry and we were initially formed with a distinct mandate: to serve the needs of the financial advisory community. Nearly two decades later, B2B Bank is a Schedule I bank still committed to a growing network of independent advisors from coast to coast.





# Why your advisor works with B2B Bank

One of the main reasons your advisor has chosen to work with us is because we value the relationship that they have with you.

# Other reasons include:

## 1 Value

Our banking solutions have to result in a better banking experience for you and your advisor so we make sure our products have competitive features and are priced just right.

## 2 Service

Your advisor trusts us to provide good, consistent service so that they can focus more on working with you.

## 3 More choice

Our products are designed in a way that allows your advisor to offer you products with a broad range of options and a variety of features.

## 4 Support

We offer online tools and resources that can help both you and your advisor make informed decisions about the products that are right for you.

## 5 Experience

We have a long history of serving advisors so we have the experience to know what your advisor needs to help you achieve your financial goals.



More than 27,000 financial advisors and mortgage brokers across Canada recommend our products and services to their clients.



## Mortgages

Whether you meet traditional lending criteria or have unique circumstances, we offer one of the most complete ranges of mortgages and lines of credit out there.

## Investment and RSP Loans

If you're looking to invest in a wide variety funds from leading mutual fund and insurance companies, our investment and RSP loans allow your advisor to do just that.

## Deposits<sup>1</sup>

More focused on safe investments? We offer GICs from four separate CDIC member issuers with rates that are among the most competitive in the market.

<sup>1</sup>B2B Bank is a member of the Canada Deposit Insurance Corporation (CDIC).

## Banking Services

Earn more interest and build your savings with our high interest investment and savings accounts.

## Investment Accounts and Services<sup>2</sup>

Diversify your investments and consolidate plans from various financial institutions with our registered and non-registered investment accounts.

<sup>2</sup>Investment Accounts and Services are offered by B2B Bank Dealer Services.

# b2bbank.com

To learn more about whether a B2B Bank product is right for you, work with your financial advisor. For day-to-day inquiries about the B2B Bank products you hold, speak with one of our knowledgeable and friendly Client Service Representatives at **1.800.263.8349** from **Monday to Friday** between the hours of **8:00 a.m.** and **8:00 p.m. ET.**

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