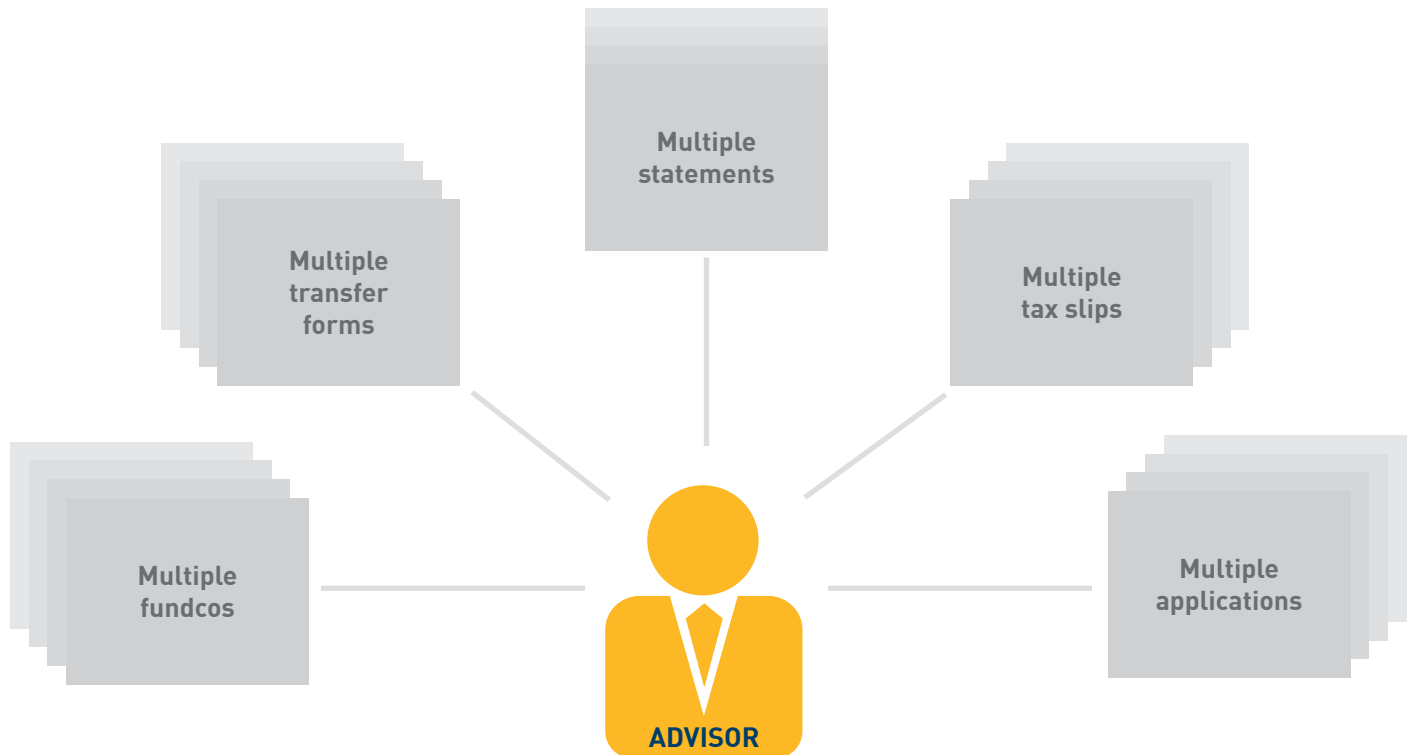


B2B Bank Dealer Services

Helping you streamline your business

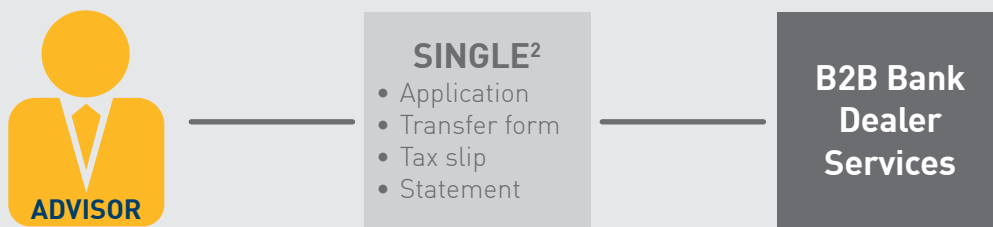
Without B2B Bank Dealer Services:

Client name model



With B2B Bank Dealer Services:

Nominee model



B2B Bank Dealer Services¹ 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 fee³.

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 us²
- ✓ Advisor Access: a secure online portal for advisors and investors, offering tools to improve the efficiency of your practice

Plus:

To make your decision even easier, take advantage of our **Transfer in Program (T.I.P.)**

- ✓ B2B Bank Dealer Services pays up to \$175 towards the cost of transferring out from your client's current financial institution.⁴

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**.

¹B2B Bank Dealer Services includes B2B Bank Financial Services Inc. (Member of the Mutual Fund Dealers Association of Canada (MFDA)), B2B Bank Securities Services Inc. (an IIROC member, Member – Canadian Investor Protection Fund) and B2B Bank Intermediary Services Inc. (an AMF-regulated dealer operating in Quebec). ²Exceptions may apply. ³Some 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. ⁴Some conditions apply - for full details speak to your Business Development Manager. 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.