

# Bank Anywhere

Do all your everyday banking, quickly, easily and safely.

## Learn how to open a wealth investment account in online banking



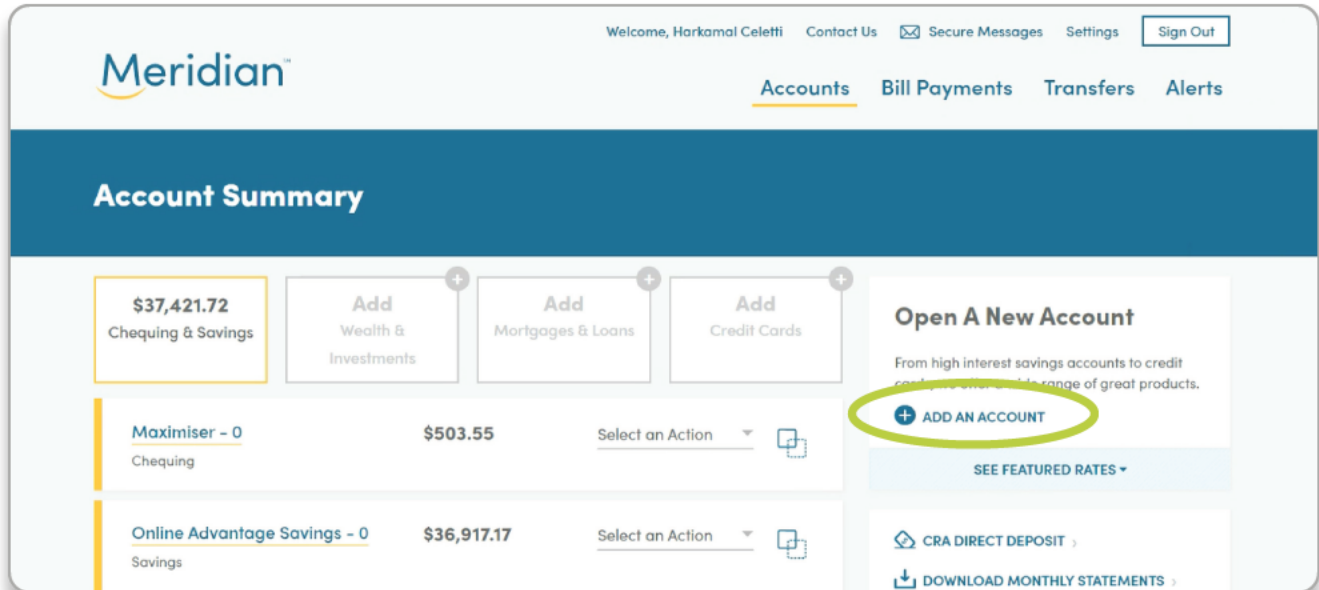
Online Guide

For more ways to bank from home, visit  
[MeridianCU.ca/BankAnywhere](https://MeridianCU.ca/BankAnywhere)

**Meridian**<sup>TM</sup>  
Where banking feels good.

## Step 1: Go to Open A New Account

If you currently don't have a wealth account you can open one by signing onto online banking, click the **'Add An Account'** link on the right side menu.



Welcome, Harkamal Celetti   Contact Us   Secure Messages   Settings   Sign Out

Accounts   Bill Payments   Transfers   Alerts

### Account Summary

**\$37,421.72**  
Chequing & Savings

Add Wealth & Investments

Add Mortgages & Loans

Add Credit Cards

#### Open A New Account

From high interest savings accounts to credit cards, we offer a wide range of great products.

**ADD AN ACCOUNT**

SEE FEATURED RATES ▾

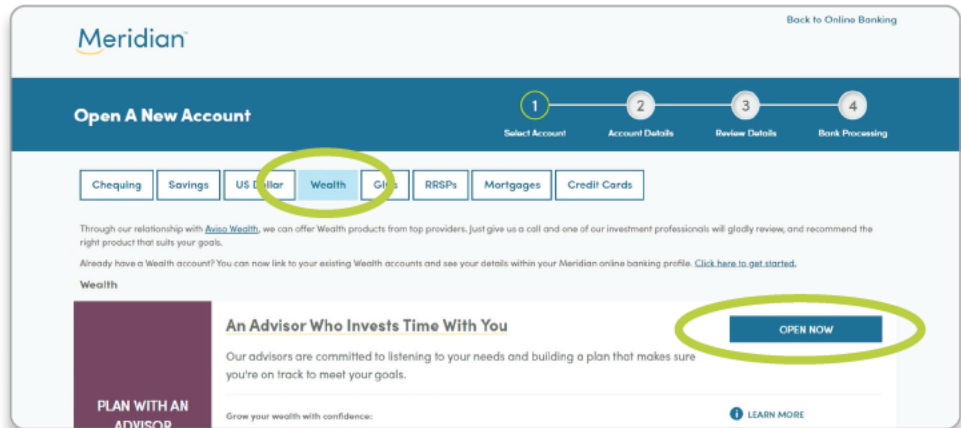
CRA DIRECT DEPOSIT ▾

DOWNLOAD MONTHLY STATEMENTS ▾

|  |                    |                    |   |
|--|--------------------|--------------------|---|
| <b>Maximiser - 0</b><br>Chequing               | <b>\$503.55</b>    | Select an Action ▾ | 📄 |
| <b>Online Advantage Savings - 0</b><br>Savings | <b>\$36,917.17</b> | Select an Action ▾ | 📄 |



On the **'Open A New Account page'**, click the **'Wealth'** tab, and then click on the **'Open now'** button under **'Plan with an advisor'**



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### Open A New Account

1 Select Account   2 Account Details   3 Review Details   4 Bank Processing

Chequing   Savings   US Dollar   **Wealth**   GICs   RRSPs   Mortgages   Credit Cards

Through our relationship with [Auto Wealth](#), we can offer Wealth products from top providers. Just give us a call and one of our investment professionals will gladly review, and recommend the right product that suits your goals.

Already have a Wealth account? You can now link to your existing Wealth accounts and see your details within your Meridian online banking profile. [Click here to get started.](#)

#### Wealth

**PLAN WITH AN ADVISOR**

#### An Advisor Who Invests Time With You

Our advisors are committed to listening to your needs and building a plan that makes sure you're on track to meet your goals.

**OPEN NOW**

LEARN MORE

**Tip:** If you already have a wealth investment account and would like to open an additional product follow the same process outlined in this guide. You will be asked to provide your preferred contact method and an advisor will reach-out to you. Alternately, you have the option to let us know of any material changes in your investor profile.

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## Step 2: Request A New Account

Review steps you'll be completing prior to selecting **Get Started**.

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### Request A New Wealth Account

#### Plan With An Advisor

Our advisors are committed to listening to your needs and building a plan that makes sure you're on track to meet your goals.

- Step 1**  
Tell us your financial goals - fill out our investor questionnaire in 5 minutes.
- Step 2**  
Submit your questionnaire so that a Meridian advisor can review it.
- Step 3**  
We'll get in touch within 2 business days to chat and help you build a plan!

Need help getting started? Reach an advisor directly by selecting "Contact Me" below.

CONTACT ME    **GET STARTED**

**Tip:** If you need any support filling out the questionnaire, you can reach out to an advisor directly by clicking '**Contact me**'.

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## Step 3: Create Your Investor Profile

Complete the information on each screen by clicking the **'Next'** button as you advance through the questionnaire. After all questions are filled-in you will be presented with a **'Submit'** button to share your investor profile with an advisor.

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### Request A New Wealth Account

#### Your Investor Profile

|                          |  |
|--------------------------|--|
| Name                     | Harkamal Celetti   |
| Address Line 1           | 842 Matthews Rd  |
| Address Line 2           | Hamilton L8R 2K3, Z7D 4U7                                  |
| Date of Birth            | Jul 23rd, 1956   |
| Age                      | 64   |
| Marital Status           | Select one   |
| Employment Status        | Select one   |
| Employer                 | Enter employer name  |
| Occupation               | Enter occupation   |
| Preferred Contact Method | <input type="radio"/> Phone<br><input type="radio"/> Email |

BACK | NEXT

**Tip:** As you are going through the profile questionnaire you can click on the **'i'** icon for more detail.

The questionnaire takes about 5 to 10 minutes to complete.

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### Request A New Wealth Account

#### Your Investor Profile

|  |                 |
|--|-----------------|
| What is your goal for this investment?   | Select one      |
| What is your initial investment amount?  | \$ Enter Amount |
| What is your monthly contribution amount?  | \$ Enter Amount |
| When do you expect to withdraw a significant portion (one third or more) of your investment? | Select one      |
| How long do you need your withdrawals to last?   | Select one      |

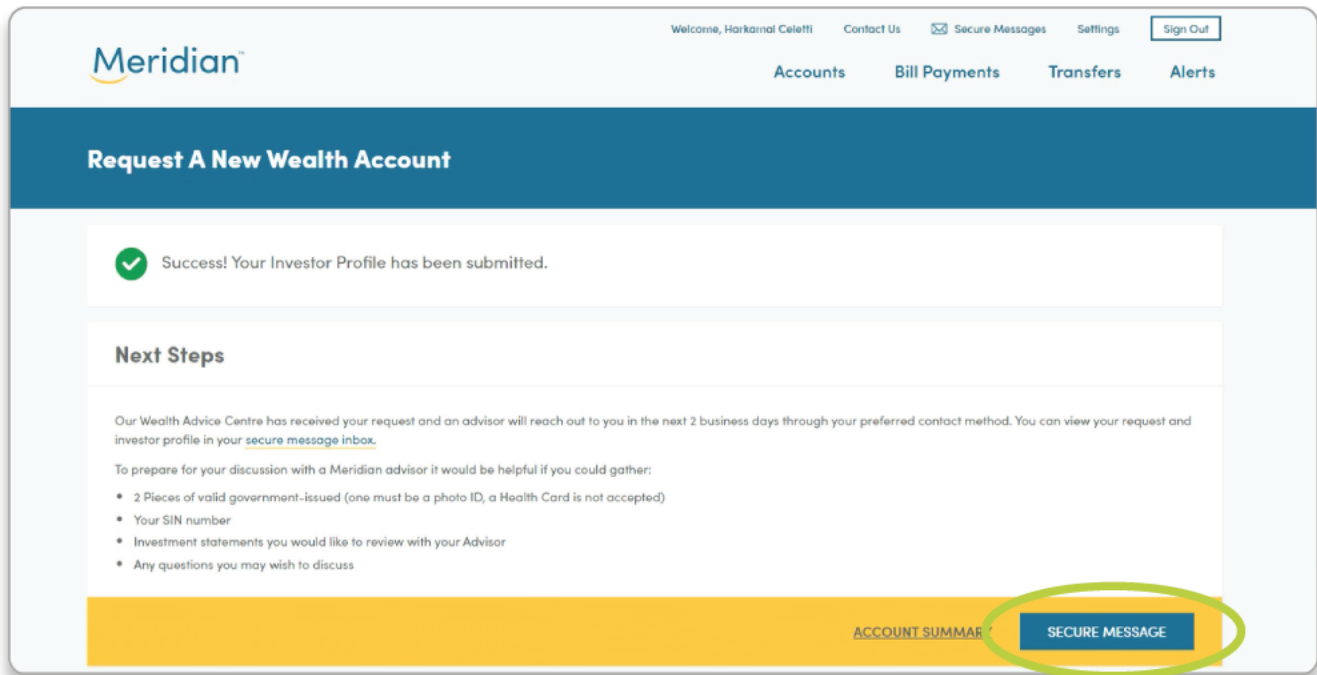
BACK | NEXT

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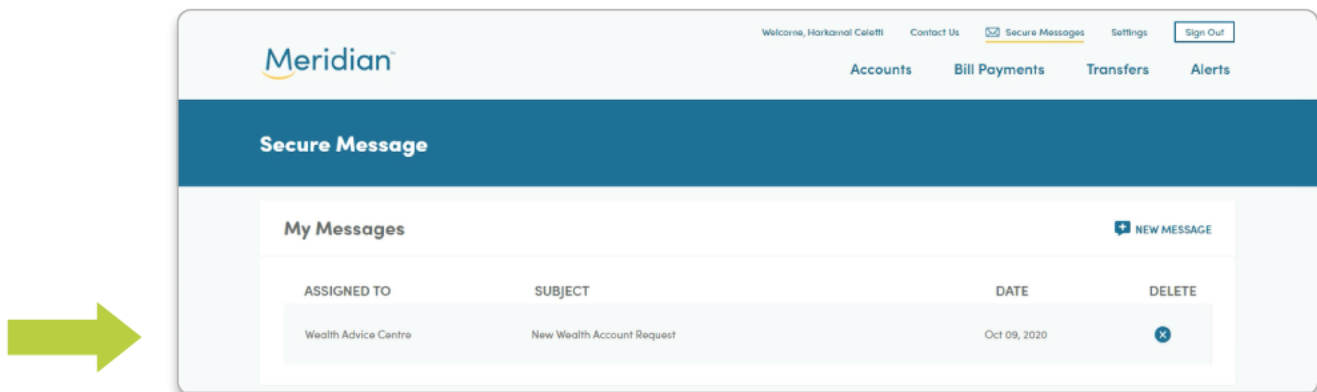
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## Step 4: Review your request on secure message


Once you've submitted your questionnaire, you'll see a message indicating you have successfully submitted your investor profile and that one of our advisors will reach out to you. You can review the information that you've submitted by clicking on **'Secure message'** button



The screenshot shows the Meridian website interface. At the top, there is a navigation bar with the Meridian logo on the left and links for 'Welcome, Harkamal Celetti', 'Contact Us', 'Secure Messages', 'Settings', and 'Sign Out' on the right. Below the navigation bar, there are links for 'Accounts', 'Bill Payments', 'Transfers', and 'Alerts'. The main content area has a blue header that says 'Request A New Wealth Account'. Below this, there is a green checkmark icon followed by the text 'Success! Your Investor Profile has been submitted.' Underneath, there is a section titled 'Next Steps' with a paragraph of text and a bulleted list of items to prepare for a discussion with an advisor. At the bottom of the page, there is a yellow bar with two buttons: 'ACCOUNT SUMMARY' and 'SECURE MESSAGE'. The 'SECURE MESSAGE' button is highlighted with a green circle.



The screenshot shows the 'Secure Message' page on the Meridian website. The navigation bar is the same as in the previous screenshot. The main content area has a blue header that says 'Secure Message'. Below this, there is a section titled 'My Messages' with a '+ NEW MESSAGE' button. Below the 'My Messages' section, there is a table with the following columns: 'ASSIGNED TO', 'SUBJECT', 'DATE', and 'DELETE'. The table contains one row of data:

| ASSIGNED TO          | SUBJECT                    | DATE         | DELETE  |
|----------------------|----------------------------|--------------|---|
| Wealth Advice Centre | New Wealth Account Request | Oct 09, 2020 |  |

A green arrow points from the left towards the 'My Messages' section.

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