

Bank Anywhere

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

Learn how to open a wealth investment account in online banking



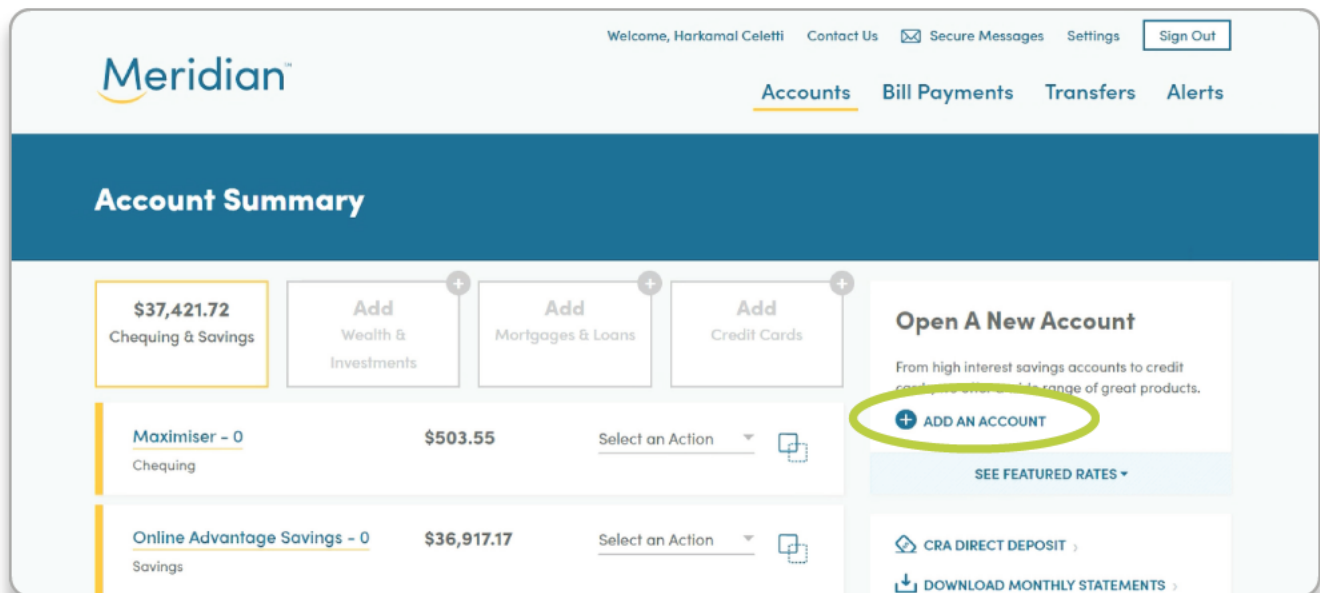
Online Guide

For more ways to bank from home, visit
MeridianCU.ca/BankAnywhere

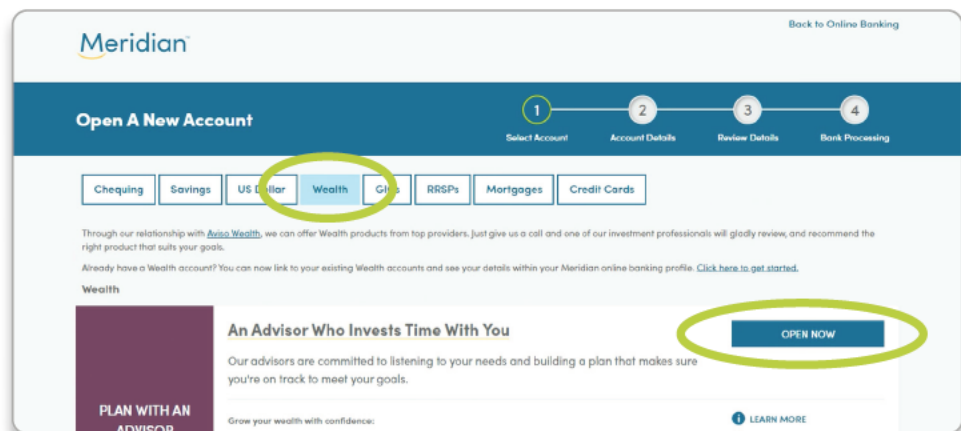
MeridianTM
Where banking feels good.

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.



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



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.

Step 2: Request A New Account

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

The screenshot shows the Meridian website interface. At the top, there's a navigation bar with the Meridian logo, a welcome message, and links for 'Contact Us', 'Secure Messages', 'Settings', and 'Sign Out'. Below this is a secondary navigation bar with 'Accounts', 'Bill Payments', 'Transfers', and 'Alerts'. The main heading is 'Request A New Wealth Account'. Underneath, there's a section titled 'Plan With An Advisor' which includes a brief statement about advisors' commitment and a three-step process:

- 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!

Below the steps, there's a note: 'Need help getting started? Reach an advisor directly by selecting "Contact Me" below.' At the bottom of the page, there's a yellow bar with a 'CONTACT ME' link and a blue 'GET STARTED' button, which is circled in green.

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

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.

Meridian

Welcome, Harkamal Celetti | Contact Us | Secure Messages | Settings | Sign Out

Accounts | Bill Payments | Transfers | Alerts

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 <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.

Meridian

Welcome, Harkamal Celetti | Contact Us | Secure Messages | Settings | Sign Out

Accounts | Bill Payments | Transfers | Alerts

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

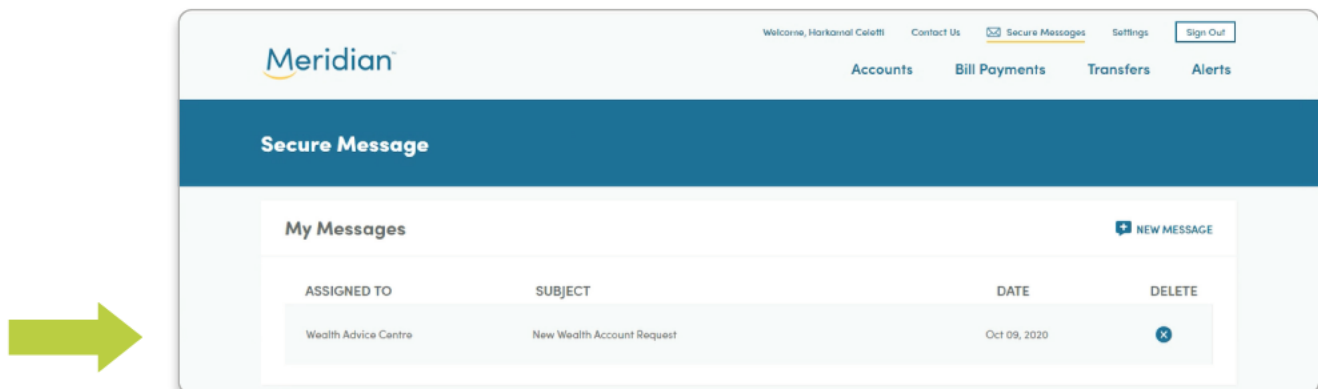
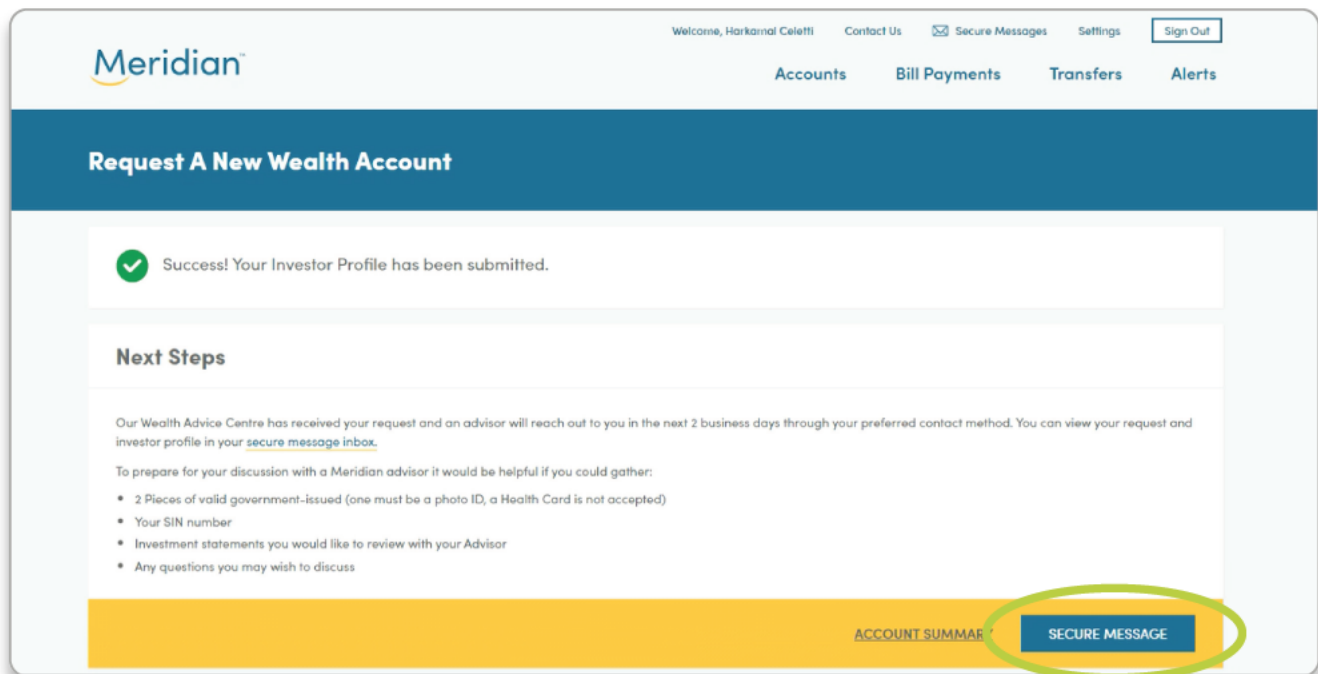
BACK NEXT

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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



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