HOW TO VIEW YOUR STATEMENTS, TAX DOCUMENTS, AND ACCESS SECURESHARE.

ACCESSING YOUR BANKING OR WEALTH AND SCOTIA ITRADE® STATEMENTS WITHIN 90 DAYS

Step 1: Select the Documents tile in the SHORTCUTS menu on the home page.

Accounts							٩
	s Investments (4)	Total invested	CAD 🔨	SHORTCUTS			
			USD		â		
		Open a new in	restment account ④	Documents	SecureShare	View orders	
			CAD USD		-	O: Transfer	
			CAD	Scotia (TRADE U	Auto-deposits	between accounts	
			USD				
			CAD USD	TRADE			
			CAD	8		2	

Step 2: Select Review Wealth and iTRADE under the Statements section to view available statements in the past 90 days.

Documents						
	DOCUMENTS		iTRADE and Wealth Showing statements rec	statements eived in the past 90 days (D	
	Statements Banking Wealth and ITRADE	^	Show account numbers			
	tin Tax ∲ Insurance ∛Çt Notices	~	Statement November 2024 Received on Nov 29, 2024 View 🕑 Download 🛓	Statement December 2024 Received on Dec 31, 2024 View 🔗 Download 🛓	Performance & Fee Statement December 2024 Received on Dec 31, 2024 View 😢 Download 🛓 🗌	Statement January 202 Received on Jan 31 View @ Download
	G SecureShare					

ACCESSING YOUR BANKING OR WEALTH AND SCOTIA ITRADE® STATEMENTS OLDER THAN 90 DAYS

Step 1: Select an account on the home page to open Account Details.

Scotia Wealth	Management					(Q)
	Overview V Trade V Watchlists V Markets V Research V	Symbol or company name			Q	
	4	Combined amount ③ CAD	SHORTCUTS			
	View settings (Showing 2 of 2) Account	Total value	View orders	Documents	SecureShare	
		CAD USD				
		CAD USD				
		CAD				

Step 2: Select View statements.

Scotia Wealth Management	Q Warage Jossuer
← Account details	
Vau disterente	
Holdings Transactions CSV 🛓	
	Print 🖨
ACCOUNT SUMMARY	
Total value Book value Market value Cash	
CAD CAD CAD	CAD
Currency Total value Market value Book value	Cash
CAD	

Step 3: Select the dropdown menu under **Statements for** to filter by time-period.

7

ACCESSING YOUR TAX DOCUMENTS

Step 1: Select the **Documents** tile in the SHORTCUTS menu on the home page.

Accounts						
	👽 Investments (4)	Total Invested	CAD A	SHORTCUTS		
		Open a new in	restment account ④	Documents	SecureShare	View orders
			CAD USD	•		G: Transfer
			CAD USD	Scotia ITRADE U	Auto-deposits	accounts
			CAD USD	TRADE		
			CAD	ø		

Step 2: Select Review Wealth and iTRADE under the Tax section to access a list of your tax documents.

S	Documents			© (?) =
(i) Home		-	-	
₽>	B	1	<u> </u>	
Move money	Statements	Tax	SecureShare	
	Review account statements up the last seven years.	to Review tax documents up to the last seven years.	Manage and safely share documents with your Scotia Wealth Management team.	
ئ ە	Review banking >			
Wealth	Review Wealth and ITRADE >	Review Wealth and iTRADE >	Manage >	
•‡• Scene+				

Step 3: You can filter your Trading and Wealth Management Tax Documents based on your preferences.

- Select the dropdown menu under **Tax Year** to filter by time-period.
- Select the dropdown menu under **Investment Service**, to filter by line of business.
- Check the box(es) under **Filter by document type** to filter by tax document type.

	me to our new look! With still free turing things and adding new features to improve your ordina banking experience. Have any sug experience through the menu on the tou-hight.	ggestoors? Give us your feedbacki if you'ne on a dealtop browser, you can owitch back to the 🕉
G Scotia W	/ealth Management	a 😩
	< Statements	
	log show account numbers	
	ScotiaMcLeod - Cash, Margin Short, Margin (1375)	Statementa lov
	Annual Trading Summary	
	reconst on Very of Distribut As.	

You can also access additional resources.

- Select **Change Tax eDelivery Preferences** (available at the bottom of the page) to select how you would like to receive your tax slips.
- Select **Learn more about tax reporting** at the bottom of the page for important dates, checklists, and frequently asked questions.

ACCESSING SECURESHARE

Step 1: Select the Documents tile in the SHORTCUTS menu in the home page.

Accounts						•
	💑 Investments (4)	Total invested	CAD 🔊	SHORTCUTS		
		Open a new inv	estment account ④	Documents	SecureShare	View orders
			CAD USD	Scotia iTRADE U	Auto-deposits	S: Transfer between
			CAD USD			accounts
			CAD USD	TRADE		
			CAD	ď		

Step 2: Select **Manage** under the **SecureShare section** to manage and securely share documents with your Scotia Wealth Management team.

2	Documents		⊙ 🔗 =
() Home	DOCUMENTS	SecureShare	
a≇ > Move money	🕅 Statements 🗸 🖓		
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	SecureShare >	SecureShare Manage and safely share documents with your Scota Wealth Management team.	
ැන > Wealth		Орип	
scene+			

Scotia Wealth Management.

[®] Registered trademark of The Bank of Nova Scotia, used under licence. Scotia Wealth Management[®] consists of a range of financial services provided by The Bank of Nova Scotia (Scotiabank[®]); The Bank of Nova Scotia Trust Company (Scotiatrust[®]); Private Investment Counsel, a service of 1832 Asset Management L.P.; 1832 Asset Management U.S. Inc.; Scotia Wealth Insurance Services Inc.; and ScotiaMcLeod[®], a division of Scotia Capital Inc. Private banking services are provided by The Bank of Nova Scotia Trust Company. Portfolio management is provided by 1832 Asset Management L.P. and 1832 Asset Management U.S. Inc.; Insurance services are provided by ScotiaMcLeod, a division of Scotia Capital Inc. International investment advisory services are provided by Scotia Wealth Insurance Services Inc. Wealth advisory and brokerage services are provided by ScotiaAcLeod, a division of Scotia Capital Inc. International investment advisory services are provided by Scotia Wealth Insurance Services are provided by Scotia Capital Inc. is a member of the Canadian Investor Protection Fund and is regulated by the Canadian Investment Regulatory Organization. Scotia Wealth Insurance Services are subsidiary of Scotia Capital Inc. is a member of the Scotiabank group of companies. When discussing life insurance products, ScotiaMcLeod advisors are acting as Life Insurance Agents (Financial Security Advisors in Quebec) representing Scotia Wealth Insurance Services Inc.

Scotia iTRADE® (Order-Execution Only) is a division of Scotia Capital Inc. ("SCI"). SCI is regulated by the Canadian Investment Regulatory Organization and is a member of the Canadian Investor Protection Fund. Scotia iTRADE does not provide investment advice or recommendations and investors are responsible for their own investment decisions.