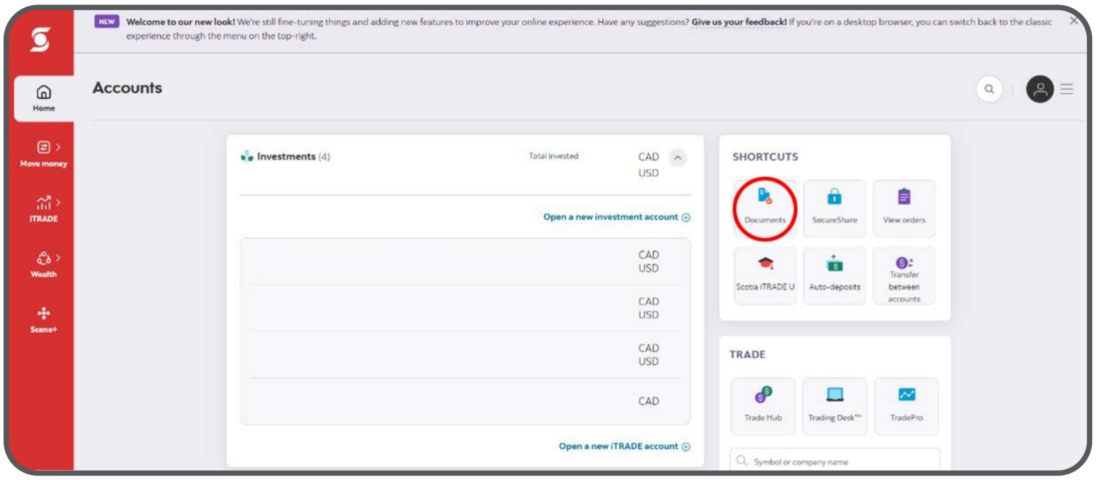
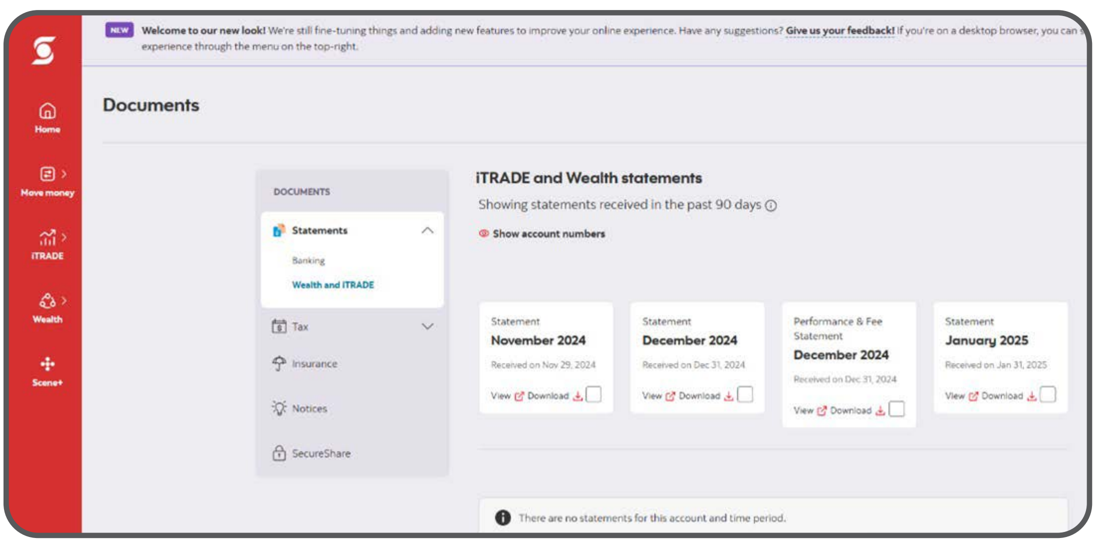
HOW TO VIEW YOUR STATEMENTS, TAX DOCUMENTS, AND ACCESS SECURESHARE.

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.

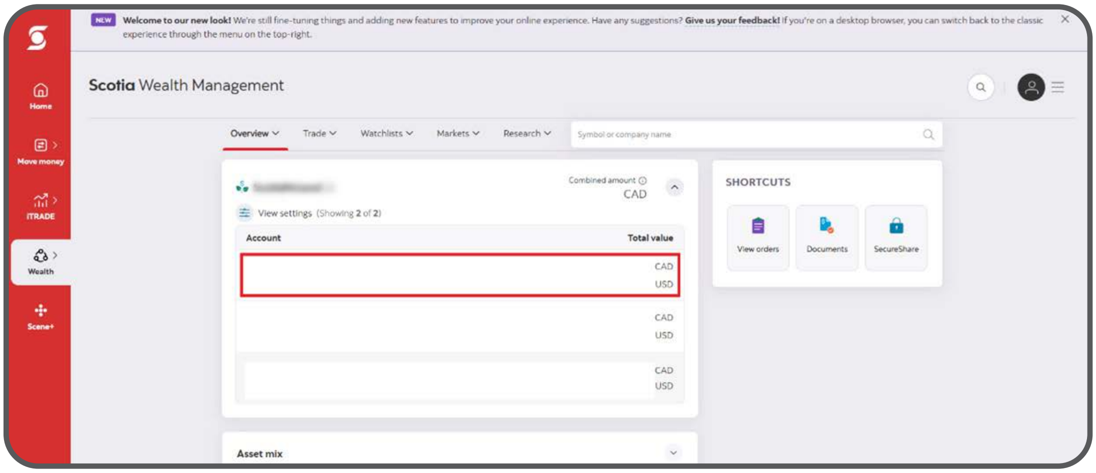


Step 2: Select **Review Wealth and iTRADE** under the **Statements** section to view available statements in the past 90 days.

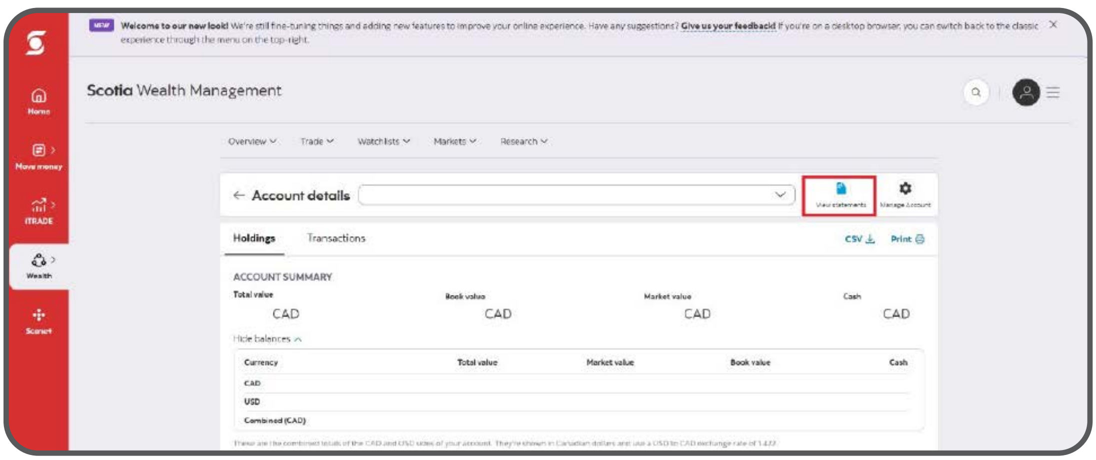


ACCESSING YOUR BANKING OR WEALTH AND SCOTIA ITRADE® STATEMENTS OLDER THAN 90 DAYS

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



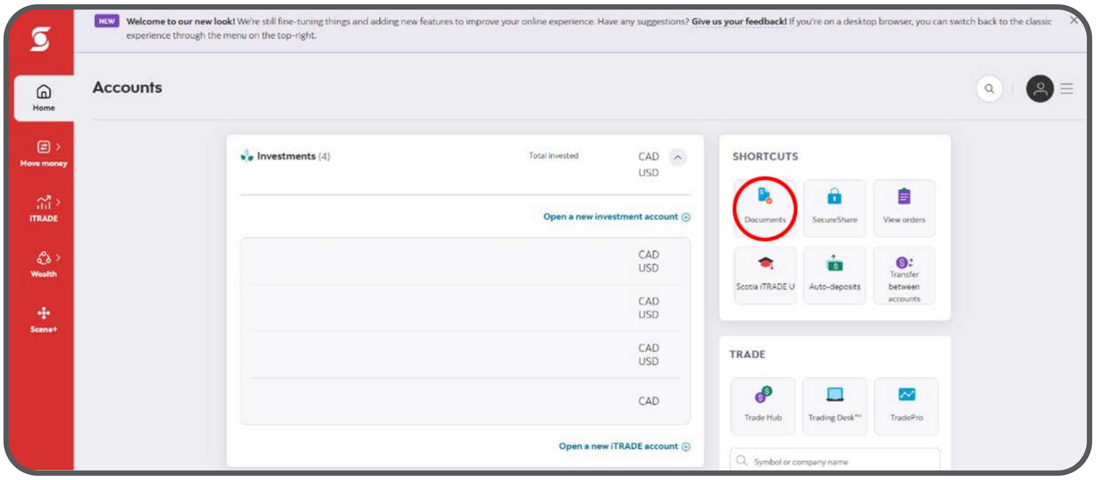
Step 2: Select **View statements**.



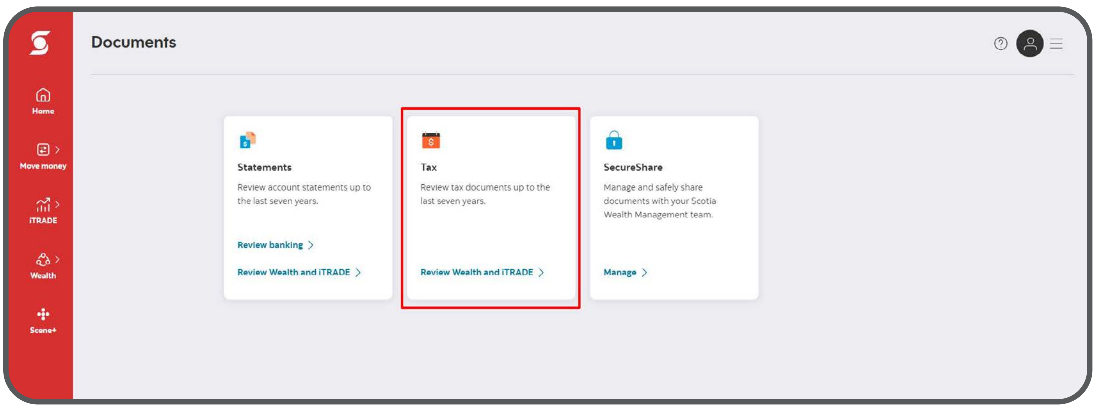
Step 3: Select the dropdown menu under **Statements for** to filter by time-period.

ACCESSING YOUR TAX DOCUMENTS

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



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



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

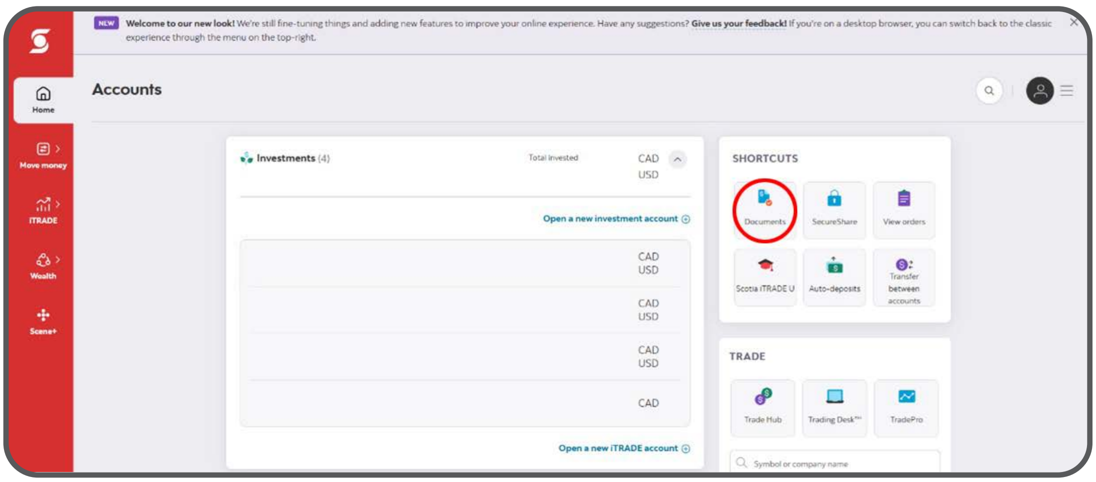
- Select the dropdown menu under **Tax Year** to filter by time-period.
- Select the dropdown menu under **Investment Service**, to filter by line of business.
- Check the box(es) under **Filter by document type** to filter by tax document type.

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.



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