

WOOD GUNDY

## SIGNING CIBC WOOD GUNDY DOCUMENTS ELECTRONICALLY ON MOBILE DEVICE

Once your account is opened, you will receive an email with the subject line *Action required: Review and sign your CIBC Wood Gundy documents*.

Follow the steps below to review and sign your CIBC Wood Gundy documents electronically when using your mobile device.

<p>Hello ROBERT ZJURUNKLE,</p> <p>We are writing to you today to request your digital signature on your CIBC Wood Gundy documents. We are providing these documents in accordance with your verbal consent to receive them electronically via this email address.</p> <p>Included below are instructions on how to sign the documents.</p> <p>Please note that the following important information is available for your reference on <a href="#">woodgundy.cibc.com</a> and <a href="#">CIBC.com</a>, as per your agreement to receive these documents digitally:</p> <ul style="list-style-type: none"><li>• <a href="#">CIBC Wood Gundy Account Information and Disclosures Booklet</a></li><li>• <a href="#">Privacy and Security</a></li><li>• <a href="#">CIBC Privacy Policy</a></li></ul> <p>To sign your documents:</p>	<ol style="list-style-type: none"><li>1. Select "Sign documents".</li><li>2. You will receive an automated text message containing a passcode.</li><li>3. Enter the passcode on the Guest Login page and select "Login".</li><li>4. Add your digital signature by selecting the signature box. <b>Make sure your digital signature looks like your real signature.</b> Select "OK" to confirm your signature. To try again, select "Clear".</li><li>5. Add your digital initials, if needed, by selecting the initials box. Select "OK" to confirm your initials. To try again, select "Clear".</li><li>6. If there are multiple signature or initial boxes, add your signature or initials to each box.</li><li>7. To finalize your documents, select "OK" in the confirmation window.</li><li>8. Close the documents in your Internet browser.</li></ol> <p><b>Sign documents</b></p>
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1. Click **Sign documents** located at the bottom of the email. The *SMS Passcode* window appears.

CIBC PRIVATE WEALTH WOOD GUNDY

Signer login

Please enter the eSign passcode that was sent to your cell phone in order to securely access your documents.

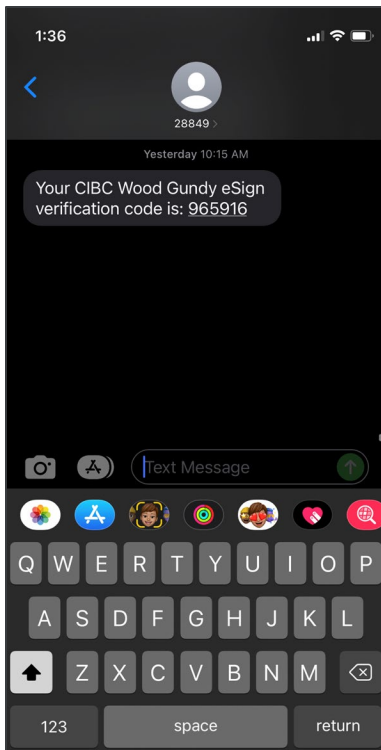
SMS Passcode

Ex. 345678

[Need a new SMS passcode?](#)

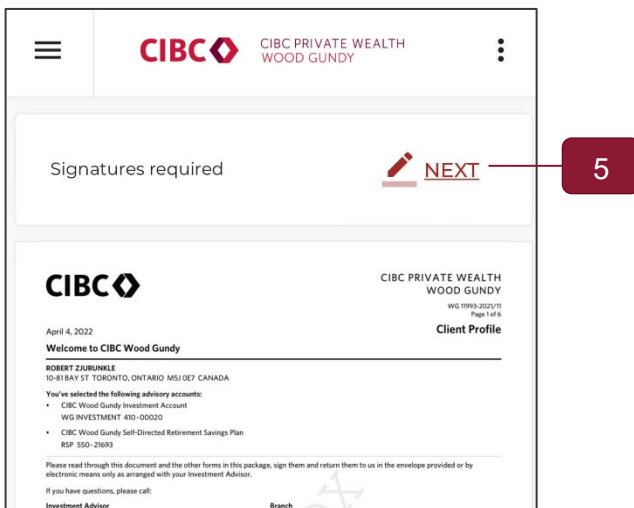
LOGIN

2. Copy or make note of the 6-digit passcode you received on your mobile device.



3. Paste or enter the 6-digit passcode in the *SMS Passcode* field.
4. Click **LOGIN**. The *Documentation* window appears.

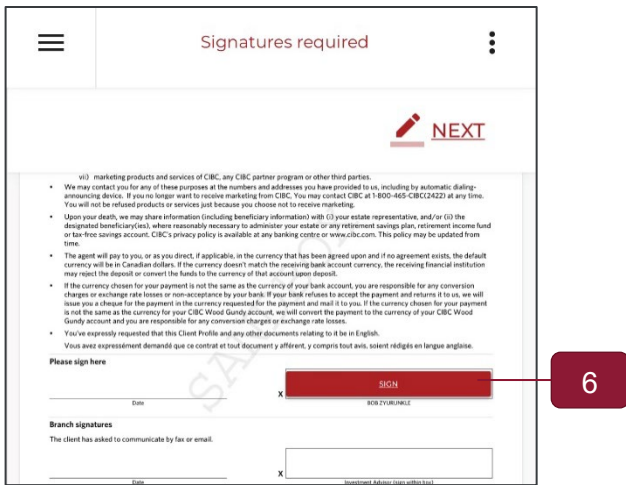
**Note:** Each passcode has a 5 minute time expiry. If your code has expired, click **Need a new SMS passcode?** to receive a new code.




5. Click **NEXT** to be directed to the next mandatory action item to be completed.

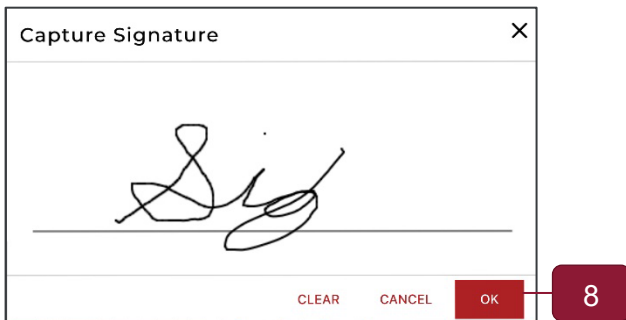
**Note:** Click  to find additional options for the document package, such as:

- **Opt Out:** Allows user to opt out of the signing ceremony, and provide a reason
- **Language:** Allows user to toggle between available languages.
- **Zoom In/Out:** Allows user to zoom in and out of the document package



6. Click **SIGN**. A *Capture Signature* window appears.

**Note:** Click the  at the top of the document package to view how many signatures are required, how many fields have been signed and how many are left. Ensure you read the document in full.



7. Rotate your phone to landscape orientation, and using your finger or stylus, draw your signature.

8. Click **OK** to accept your signature. A *Confirm* message appears.

or

Click **CLEAR** to re-do your signature.

**Note:** Click **CANCEL** to exit the pop-up window without signing.


The eSignature you provide must look like your true signature.

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February 24, 2022 CIBC Wood Gundy Client Profile

- Are not guaranteed by CIBC, and  
May fluctuate in value.
- You consent to the collection, use and sharing of your personal information as described in CIBC's privacy policy. Your Privacy is Protected. This includes sharing information about you within the CIBC Group, and with any agent and promoter of any registered plan, credit bureau, government institutions or registries, mutual fund companies and other issuers, regulators and self-regulatory organizations, other financial institutions, any references you give us, and others as may be needed for:
  - identifying you,
  - qualifying you (or someone you are providing a guarantee for) for products and services,
  - confirming information you give us,
  - protecting you and CIBC from errors and criminal activity,
  - facilitating tax and other reporting,
  - fulfilling legal and regulatory responsibilities, and
  - marketing products and services of CIBC, any CIBC partner program or other third parties.
- We may contact you for any of these purposes at the numbers and addresses you have provided to us, including by automatic dialing-announcing device. If you no longer want to receive marketing from CIBC, you may contact CIBC at 1-800-465-CIBC(2422) at any time. You will not be refused products or services just because you choose not to receive marketing.
- Upon your death, we may share information (including beneficiary information) with (i) your estate representative, and/or (ii) the designated beneficiary(ies), where reasonably necessary to administer your estate or any retirement savings plan, retirement income fund or tax-free savings account. CIBC's privacy policy is available at any banking centre or www.cibc.com. This policy may be updated from time to time.
- The agent will pay to you, or as you direct, if applicable, in the currency that has been agreed upon and if no agreement exists, the default currency will be in Canadian dollars. If the currency doesn't match the receiving bank account currency, the receiving financial institution may reject the deposit or convert the funds to the currency of that account upon deposit.
- If the currency chosen for your payment is not the same as the currency of your bank account, you are responsible for any conversion charges or exchange rate losses or non-acceptance by your bank. If your bank refuses to accept the payment and returns it to us, we will issue you a cheque for the payment in the currency requested for the payment and mail it to you. If the currency chosen for your payment is not the same as the currency for your CIBC Wood Gundy account, we will convert the payment to the currency of your CIBC Wood Gundy account and you are responsible for any conversion charges or exchange rate losses.
- You've expressly requested that this Client Profile and any other documents relating to it be in English.  
Vous avez expressément demandé que ce contrat et tout document y afférent, y compris tout avis, soient rédigés en langue anglaise.

**Please sign here**

Feb 24, 2022 19:33:48 GMT Signed by  
BOB ZYURUNKLE 

Date BOB ZYURUNKLE

**Branch signatures**  
The client has asked to communicate by fax or email.

Date Investment Advisor (sign within box)

Date Investment Advisor (sign within box)

Please confirm to complete signing **CONFIRM**

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9. Click **CONFIRM**. If there are additional documents to review and sign, you are automatically directed to the following document in the package. Return to step 5.

**Note:** You may need to sign more than one document package. Your CIBC Wood Gundy Representative may send them to you one at a time. In these instances, you will receive emails with identical subject lines for each document package. Please ensure to open and action each email in the order that you receive them in your Inbox to avoid confusion.

Follow the instructions above to sign each set of documents before moving on to the next.

Thank you, **BOB ZYURUNKLE**

You have completed signing all the documents required in this package.

**What's Next?**

You may now close your browser window, or click on Exit to be directed to your CIBC Private Wealth Management website.

*Thank you for choosing CIBC Wood Gundy!*

**DOWNLOAD DOCUMENTS**

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**EXIT**

"CIBC Private Wealth" consists of services provided by CIBC and certain of its subsidiaries, through CIBC Private Banking; CIBC Private Investment Counsel, a division of CIBC Asset Management Inc. ("CAM"); CIBC Trust Corporation; and CIBC Wood Gundy, a division of CIBC World Markets Inc. ("WMI"). CIBC Private Banking provides solutions from CIBC Investor Services Inc. ("ISI"), CAM and credit products. CIBC World Markets Inc. and ISI are both Members of the Canadian Investor Protection Fund and Investment Industry Regulatory Organization of Canada. CIBC Private Wealth services are available to qualified individuals.

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