

YOUR WOOD GUNDY ONLINE EXPERIENCE

CIBC Wood Gundy Online (WGOL) is a private and secure service available to you as a CIBC Wood Gundy client. WGOL provides you with easy access to your investment account information, including eDocuments such as account statements, tax packages and trade confirmations. It also allows you to update mailing options and transferring funds between your banking and investment accounts online quickly and securely.

Take a tour of WGOL and find out how to view and manage your investment accounts online, get the latest quotes and research, and benefit from the additional features and preference settings available to you.

This guide will help you navigate WGOL.

How to register for WGOL

Once you've received your user ID and temporary password from your investment advisory team, your temporary password must be replaced with a customized password to complete your registration. Follow the steps below to change your temporary password and complete your registration:

 Visit <u>www.woodgundy.cibc.com</u> and enter your user ID and the temporary password provided to you and click the Sign on button

Note: It is not recommended to use the auto-fill function within your browser. If a **save your password** pop-up window appears, please **do not enable** this as the temporary password must be changed in the next step to complete your WGOL registration.

	Sign On
	User ID
	Remember my User ID
	Password
	Show password
	Reset my password
1	Sign on
	☆ Security guaranteed
	Electronic access agreement
	🚍 <u>Take a tour</u>

- 2. Enter the temporary password provided to you in the Current Sign On Password field
- 3. Enter your new password in the New Sign On Password field

Note: Password should be unique and meet the following requirements:

- Must be between 8-12 <u>numbers</u> in length
- Cannot begin with a O
- Cannot have any numerical sequences (for example: 123 or 987) or three repeating numbers in a row (for example: 111, 222, or 333)
- · Cannot contain any alpha or special characters
- Re-enter your new password in the Re-Enter New Password to Confirm field
- Click the Save Changes button at the bottom right side of the screen

Step 1 of 2. Create new password(s)	
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Comparison the following fields to proceed.	
Change Sign On Password	
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	Your account numbers or your Liner ID
	 Your beth date or telephone number
Re-exter new sign on password:	 The same password on multiple reduins.
	Police these tips for additional secarity:
	Change your personnel regularly
	 Index 6 difficult for others to parent your patiented. If you there someone knows your parenters, change 6 immediately

6. Click **Continue**. The *One-Time Verification Codes* screen will appear. You must complete this verification to receive a one-time verification code to confirm your identity in order to continue the registration process.

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	Confirmation or Sign On processed has been changed.	Security Tips Di nti Many our passenti atti anyona Gung you passentin ta anthra pansin er company paces you hanosi act you pinacy at dak	

7. To receive this one-time verification code, select a preferred contact method

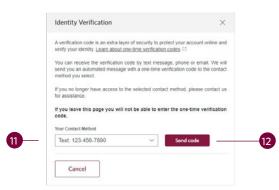
- **8.** Complete the 'Security contact information' by selecting one of the contact method options and enter your contact information in the fields provided
- **9.** Select **Yes** or **No** to opt in or out of being prompted to enter a verification code every time you sign on for added security
- **10.** Click the **Continue with setup** button. The *Identity Verification* page will appear.

Note:

- Only one contact method is required. Text message or voice call is recommended.
- Identity verification codes can be sent to Canadian or U.S. telephone numbers as well as to some international telephone numbers
- Acceptable email addresses include those from most corporations (i.e., employer) or educational institutions. If you do not wish to receive the identity verification code by email, please leave this field blank.
- Common email addresses such as Gmail, Yahoo, Hotmail, Rogers, Bell etc. cannot be registered. Please leave the email field blank when the error message appears in order to go to the next screen.

		orline activities. This allows us to confern your strently and faither protect your account
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sign on?	to the to be provided for a verification code every time you appy to both incluie and dealog.	

- **11.** To send a verification code to your preferred contact method, select your preferred contact method under the *Your Contact Method* drop down
- **12.** Click **Send code**. A 6-digit code will be sent to your selected method.



- 13. Complete the verification code process by entering the 6-digit verification code that you received in the *Verification Code* pop-up window
- **Note:** The verification code expires within 15 minutes after it is received. If you require a new code, repeat steps 5 and 6 within this section to have another code sent to you.
- **14.** Click the **Next** button. The *Electronic Access Agreement* screen will appear.
- **15.** Once you've read the Electronic Access Agreement, click on **I agree** at the bottom of the page

Your Contact Method	Resend code
	n code has been sent. essages, if you did not receive the code you can request
the code again or cha	nge your contact method.

How to modify your mailing options

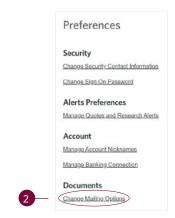
You can customize your mailing preferences on WGOL and choose whether to receive your monthly statements, trade confirmations and tax documents in hard copy by mail, or to view them only electronically online. The electronic copies are available for both options and can be accessed under the eDocuments tab within WGOL and are available for you to view at any time.

Follow these steps to select your mailing preferences:

1. Click on the Preferences tab



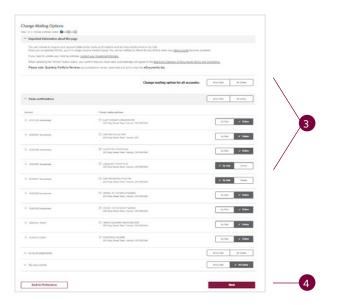
2. Click on Change Mailing Options



3. Customize your preferred mailing options for your statements, trade confirmations and tax packages by selecting your preferred mailing options for each of the documents listed <u>**OR**</u>,

Select **All Online** to have all documents available to you only electronically

4. Once you've completed your selection(s), click Submit



Note: Only the owner of an account can change the mailing options. Mailing options for any accounts that are added to the user ID as letter of authorization can't be changed and the radio button will be greyed out.

5. Click on Save Changes

Change Mailing Opti	ons			
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Back		Cancel .	Same Changes	5

6. The confirmation screen will confirm that the changes were made

Note: Statement options that have been changed to **Online Only** at the end of the month may still be sent by mail the following month until the changes take effect.

Change	e Mailing Options
Step 3 of 3	
0 0	0
	0
	Confirmation
	Your mailing options have been updated and will take effect on the next business day.

How to reset your WGOL password

Once you've completed the verification process, you're able to reset your password at any time without having to contact your investment advisory team or CIBC Wood Gundy Client Relations.

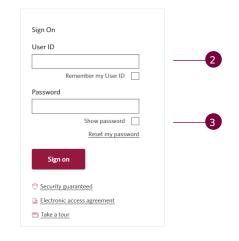
Note: Your WGOL access will be suspended following three unsuccessful log in attempts with an incorrect password. If you cannot remember your password by the second attempt, please ensure to reset your password to prevent your access from being suspended.

Complete the following steps to reset your WGOL password:

- 1. Visit the main WGOL sign on page: www.woodgundy.cibc.com
- 2. Enter your User ID and leave the Password field blank

Note: If there are any dots in the **Password** field, delete them before continuing.

- 3. Click on Reset my password
- **4.** Follow the prompts once your identity has been confirmed through the one-time verification code process



How to set up single sign on with CIBC Online Banking

If you're an existing CIBC online banking registered user, you're able to link to your WGOL sign on access so that you don't need to sign on to both sites separately.

New to CIBC Online Banking? Complete your registration.

Follow the steps below to set up your WGOL single sign on:

- 1. Visit and log into WGOL www.woodgundy.cibc.com
- 2. Click on the Preferences tab

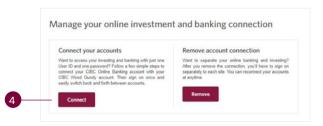


3. Click on Manage Banking Connection

Fre	ferences
Secu	rity
Chang	e Security Contact Information
Chang	e Sign On Password
Alert	s Preferences
Manag	e Quotes and Research Alert
Acco	unt
Manag	e Account Nicknames
Manag	e Banking Connection
Docu	iments
Chang	e Mailing Options

4. Click on Connect

3



5. Sign on with your CIBC online banking credentials

Note: If an error message appears, it means that the system recognizes a previous convenience card that is associated with your existing WGOL registration and as a result, it requires to be removed. Please follow the steps below to remove the association prior to establishing a new connection.

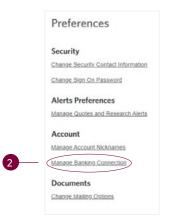
How to remove your existing CIBC Online Banking association

Complete the steps within the previous section *How to set up* single sign on with CIBC Online Banking

1. Click on the Preferences tab

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	News and Notes	Accente	eDocuments.	Transaction Millions	Accord Holdings	Me Accords		

2. Click on Manage Banking Connection



3. Click on Remove

Connect your accounts	Remove account connection
Want to access your investing and banking with just one User ID and one password? Follow a few simple steps to connect your CIBC Online Banking account with your CIBC Wood Gundy account. Then sign on once and easily switch back and forth between accounts.	Want to separate your online banking and investing? After you remove the connection, you'll have to sign on separately to each site. You can reconnect your accounts at anytime.

Contact us

We're here to help! Please contact your investment advisory team or CIBC Wood Gundy Client Relations by email at <u>client.relations@cibc.com</u> if you have any questions regarding CIBC WGOL site.

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