

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.

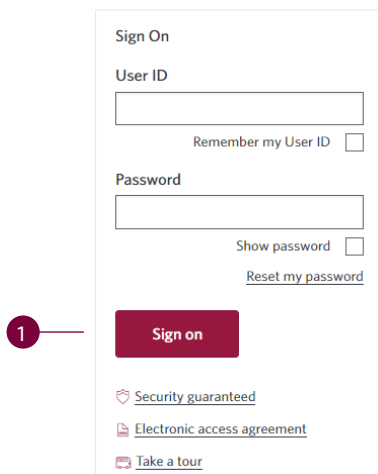
This guide will help you navigate WGOL.

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:

1. Visit www.woodgundy.cibc.com 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.

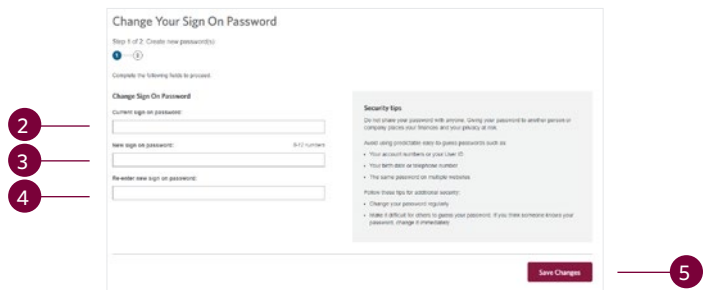


2. Enter the temporary password provided to you in the **Current Sign On Password** field
3. Enter your new password in the **New Sign On Password** field

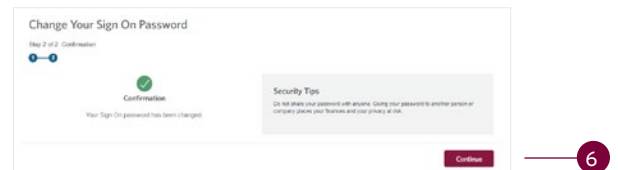
Note: Password should be unique and meet the following requirements:

- Must be between 8-12 numbers in length
- Cannot begin with a 0
- 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

4. Re-enter your new password in the **Re-Enter New Password to Confirm** field
5. Click the **Save Changes** button at the bottom right side of the screen



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.



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.

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

How to modify your mailing options

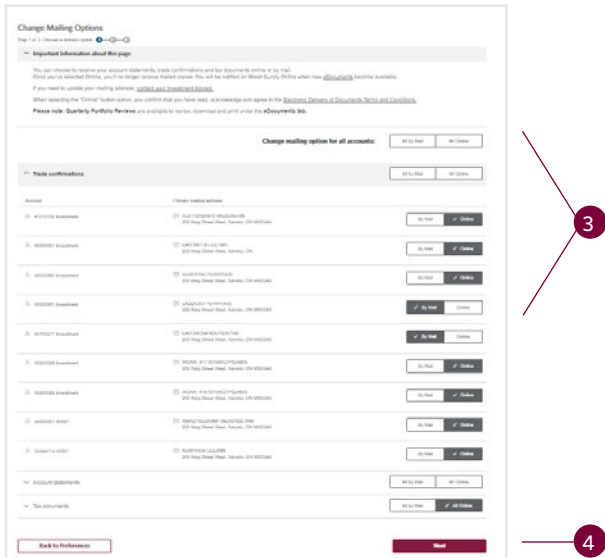
You can customize your mailing preferences on WGOL and choose whether to receive your monthly statements, trade confirmations and tax documents in hard copy by mail, or to view them only electronically online. The electronic copies are available for both options and can be accessed under the eDocuments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

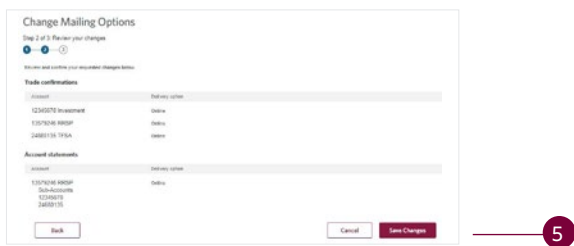
2. Click on **Change Mailing Options**

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 **OR** Select **All Online** to have all documents available to you only electronically
4. Once you've completed your selection(s), click **Submit**



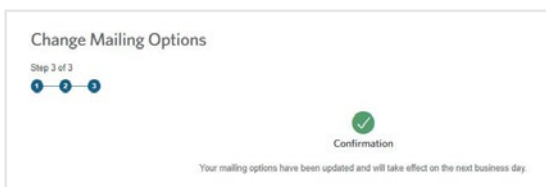
Note: Only the owner of an account can change the mailing options. Mailing options for any accounts that are added to the user ID as letter of authorization can't be changed and the radio button will be greyed out.

5. Click on **Save Changes**



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.



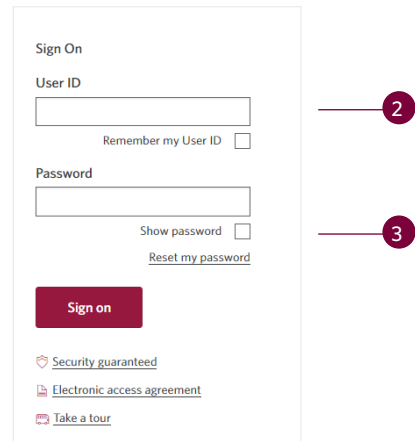
How to reset your WGOL password

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

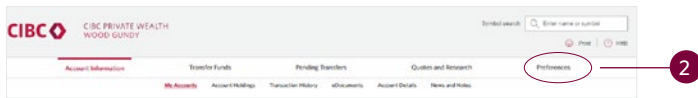
If you're an existing CIBC online banking registered user, you're able to link to your WGOL sign on access so that you don't need to sign on to both sites separately.

New to CIBC Online Banking? [Complete your registration.](#)

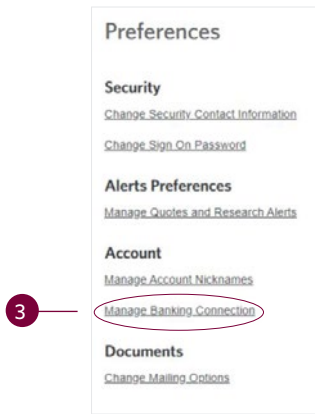
Follow the steps below to set up your WGOL single sign on:

1. Visit and log into WGOL www.woodgundy.cibc.com

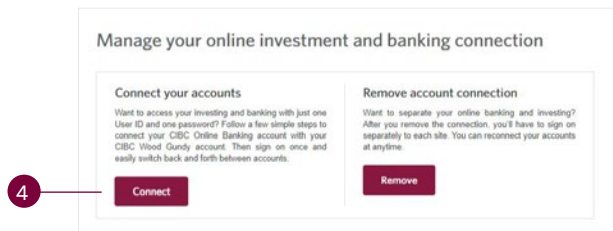
2. Click on the **Preferences** tab



3. Click on **Manage Banking Connection**



4. Click on **Connect**



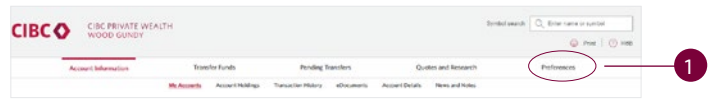
5. Sign on with your CIBC online banking credentials

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.

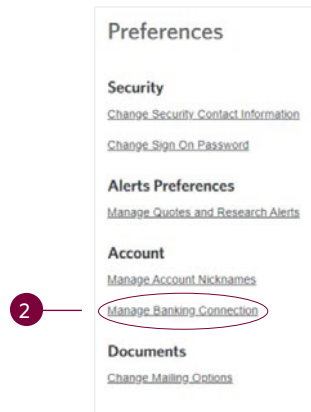
How to remove your existing CIBC Online Banking association

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

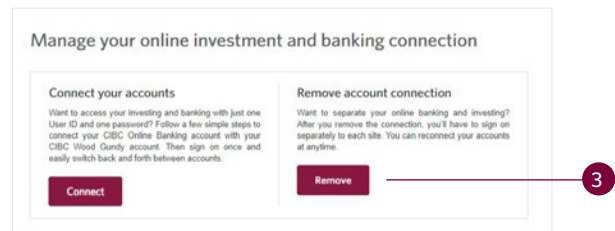
1. Click on the **Preferences** tab



2. Click on **Manage Banking Connection**



3. Click on **Remove**



Contact us

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