

# Making Online Contributions To Assante Accounts

**Thomson Financial Partners**  
Assante Capital Management Ltd.



Since 1965 Thomson Financial Partners, based in North Bay, Ontario, has been a leader in delivering superior financial planning throughout Canada. We help families, successful professionals and entrepreneurs create a long-term plan for financial security and peace of mind through a comprehensive Wealth Management process.

We appreciate how busy life is for you and your family. We offer the simple and convenient flexibility to transfer money from your personal bank account directly to your accounts at Assante. By accessing your personal bank account either online or by telephone at any major financial institution, you can set up Assante as a “payee” just as you would set up an account to pay your bills.

- 1) Log in to your Bank, Credit Union or Trust company online banking website and select “Add New Payee” and follow their prompts.
- 2) Enter payee name as “**Assante Capital Management Ltd.**”
- 3) When prompted for your Assante account number, please indicate the number as outlined on your Assante statement, including the letter suffix at the end. The sample statement below highlights where to find this information on your statement.

**Assante**  
WEALTH MANAGEMENT

**CONSOLIDATED PORTFOLIO OF**  
JOE CLIENT  
JANUARY 31 2006

**YOUR FINANCIAL ADVISOR ...**  
**ASSANTE CAPITAL MANAGEMENT LTD.**

JOE ADVISOR  
123 INVESTMENT RD N  
ANYTOWN, ON M0M 0M0  
Phone: (416) 555-1234  
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JOE CLIENT  
123 ANYWHERE ST  
ANYTOWN, ON M0M 0M0

(AST021000\_111111\_001) E: 93 - M: 10

**IN THIS STATEMENT**

ACCOUNT NUMBER	ACCOUNT TYPE	MARKET VALUE ON JAN 31, 2006 (\$)	MARKET VALUE ON FEB 28, 2006 (\$)	PAGE
1234567F	Open	110,011.09	134,338.99	3

## Investing the funds

Your transaction will take approximately 12 - 48 hours to appear within your Assante account. The funds will be deposited to a cash position, so we encourage you to contact us to confirm the deposit and discuss how the funds should be invested. Please contact your financial institution if you experience any issues with your set up process. Please note that online deposits are only available for those accounts for which you receive Consolidated Portfolio Statements from Assante.

This material is provided for general information and is subject to change without notice. Every effort has been made to compile this material from reliable sources however no warranty can be made as to its accuracy or completeness. Before acting on any of the above, please make sure to see a professional advisor for individual financial advice based on your personal circumstances. Assante Capital Management Ltd. is a member of the Canadian Investor Protection Fund and is registered with the Investment Industry Regulatory Organization of Canada.