



ONLINE BANKING INSTRUCTIONS

Making Contributions To Your CI Assante Accounts Online

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 CI Assante. By accessing your personal bank account either online or by telephone at any major financial institution, you can set up CI Investment Services Inc. as a “payee” just as you would set up an account to pay your bills.

STEPS

Log in to your Bank, Credit Union or Trust company online banking website and select “*Add New Payee*” and follow their prompts.

1. Enter payee name as “CI Investment Services Inc.”
 - a. IMPORTANT - If you currently have Assante Capital Management set up as a payee, do not edit that payee with your new account numbers. You must delete it and create a new payee.
2. When prompted for your Assante account number, please indicate the number as outlined on your new CI Assante statement or call our office and we will provide it to you.

INVESTING IN FUNDS

Your transaction will take approximately 24 - 48 hours to appear within your CI 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 CI 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. CI Assante Wealth Management Ltd. is a member of the Canadian Investor Protection Fund and Canadian Investment Regulatory Organization.

THOMSON FINANCIAL PARTNERS

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