

ONLINE BANKING ENHANCEMENTS

Avisio Wealth

An exciting new wealth management feature is coming to digital banking! Starting on December 3rd, members who manage their investments with Avisio will be able to see their account information in online and mobile banking.

Your Investments, All in One Place

You can now view your Avisio investment accounts directly in online and mobile banking – no need to sign in separately.

Seamless Access to Your Portfolio

See your account balances, recent transactions and investment details in a single, secure view.

Link Multiple Accounts

Members can link multiple Avisio products, including Avisio Wealth, Qtrade Investor and Qtrade Guided Portfolios, using their Avisio Client ID.

Easy Setup in Three Steps

Linking your Avisio accounts is simple – just follow the three-step process in the new “Wealth Management Accounts” section of digital banking.

Secure and Convenient

This feature is designed to give you secure, convenient access to your investment information – right alongside your everyday banking.

View-Only Access

Linked Avisio accounts are view-only in digital banking. To make trades or manage investments, you’ll still sign in to Avisio directly.

Control at Your Fingertips

You can disconnect linked accounts anytime through online or mobile banking and re-link them whenever needed.