

# Electronic funds transfer



## Easier and faster than ever to make contributions!

- ✔ Faster and less expensive than issuing cheques
- ✔ Less back and forth with your Representative
- ✔ Reduced potential for errors

### Important notes:

- \* A delay of 24 to 72 hours may apply between the moment a new payee is added and a first deposit can be made. This delay may vary among banking institutions.
- Investia has agreements with the majority of Canadian financial institutions.
- \*\* The money must come from the account holder's bank account.
- \*\*\* You may select HollisWealth or Investia Financial Services Inc. as a payee in your bank profile. However, please DO NOT select HollisWealth – Division of Industrial Alliance Securities Inc. as this option is reserved for securities related business only.

## Steps to follow

- 1 – **Log in** to your banking institution's website.
- 2 – **Add "HollisWealth" or "Investia Financial Services Inc."** as a payee, in the same way as you would do to enable the payment of any invoice.
- 3 – **Enter the Investia nominee plan number** as the reference number.  
This number may be found on your Investia Statement or Client Portal. You may also contact your Representative who will provide it to you.

## Your account

### Nominee Open Account (INV) - Investia Financial Services

Account Number: 123456 ▶ Model portfolio: Income and Growth Portfolio

- 4 – **Repeat** this process for **each account**.  
e.g. If you have an RRSP and a TFSA, enter the appropriate Investia nominee plan number for each account. (If the option is available, we recommend that you identify each of your accounts based on the plan type (e.g. TFSA, RRSP, etc.).
- 5 – **Enter** the amount and proceed with the transfer.
- 6 – **Notify** your Representative to discuss the various investment options available to you.  
**Your Representative will be notified of your transfer within 24–48 hours.**

**For more information, please contact your Representative.**

<sup>W</sup>**HollisWealth**<sup>®</sup>

HollisWealth is trade name of Investia Financial Services Inc.