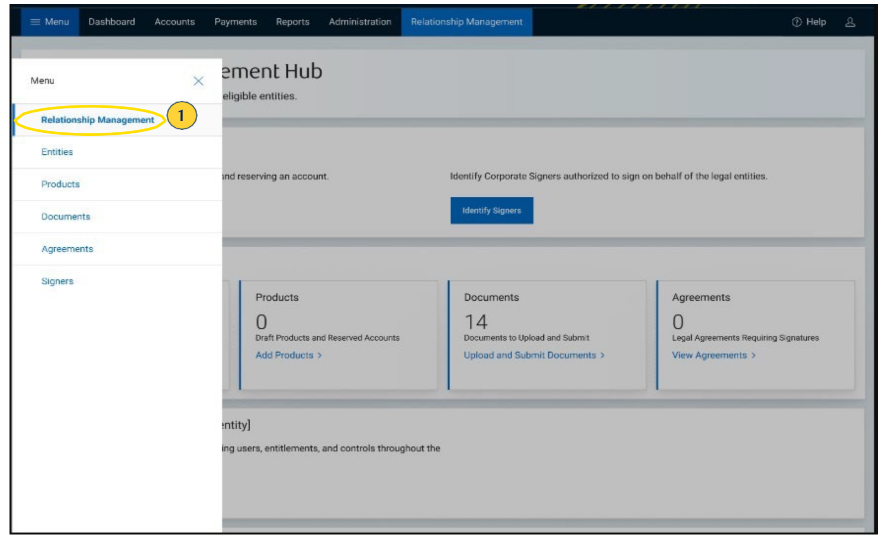
Capital Markets

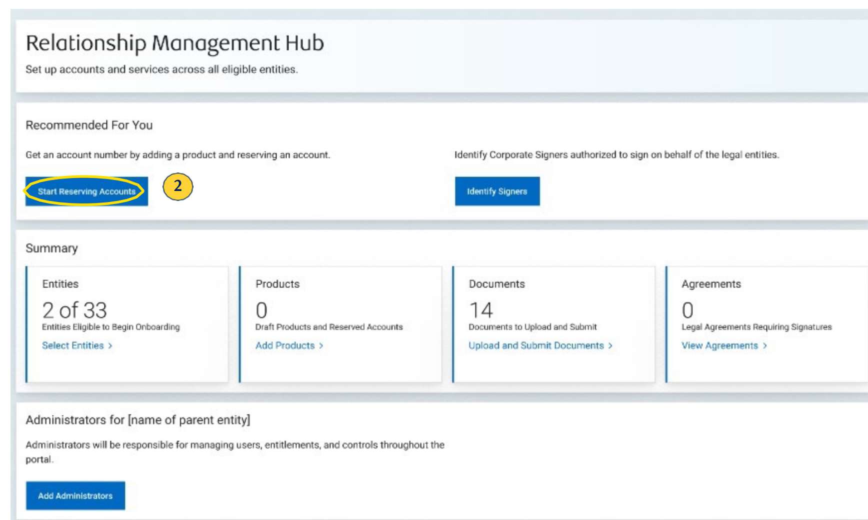
RBC Clear™
Working Capital Solutions

How to Onboard to RBC Clear

1. In the top blue bar click the **Relationship Management** tab.



2. In the “Recommended For You” section click the **Start Reserving Accounts** button to reserve your account.



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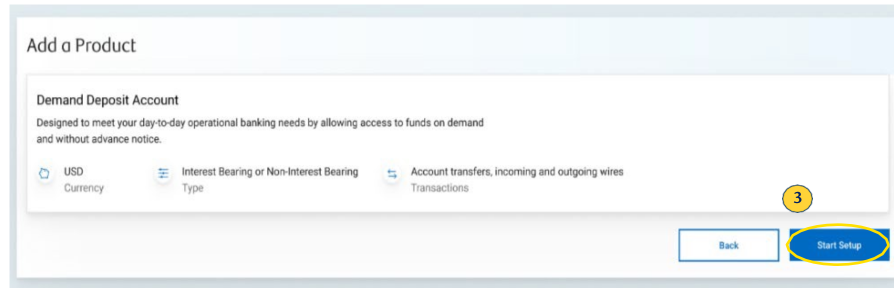
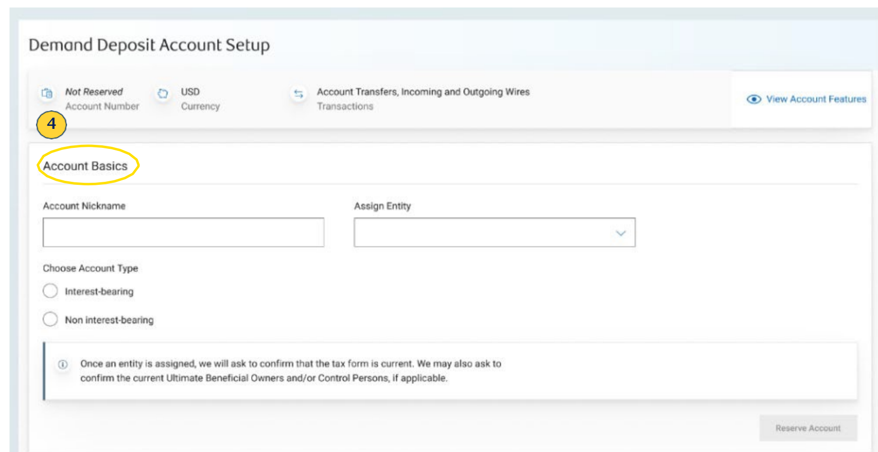
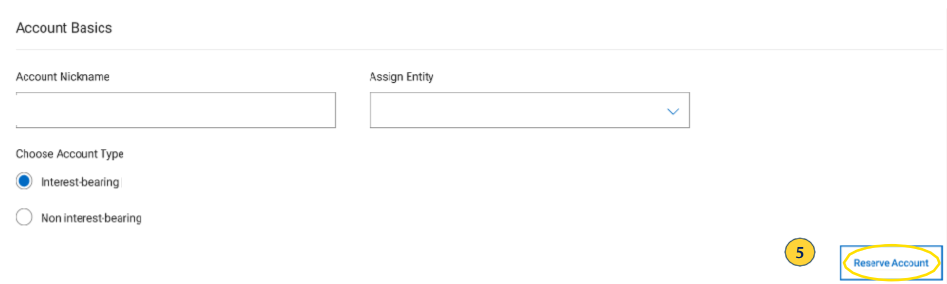
3. A screen titled “Add a Product” will populate. Under the “Add Products” tab, select Demand Deposit Account and click **Start Setup**.



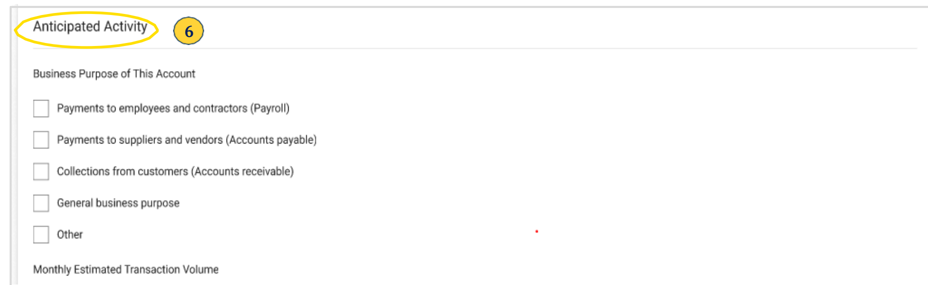
4. Fill out all required information in the **“Account Basics”** section.



5. Once all information is entered click, **Reserve Account.** Doing this will generate an Account Number.



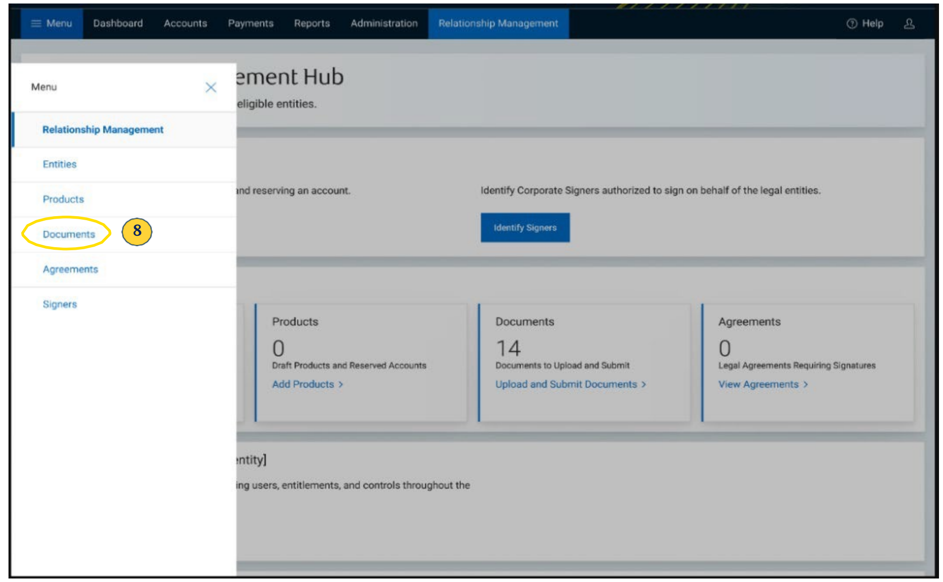
6. Scroll down to the **"Anticipated Activity"** section and fill out all required information.



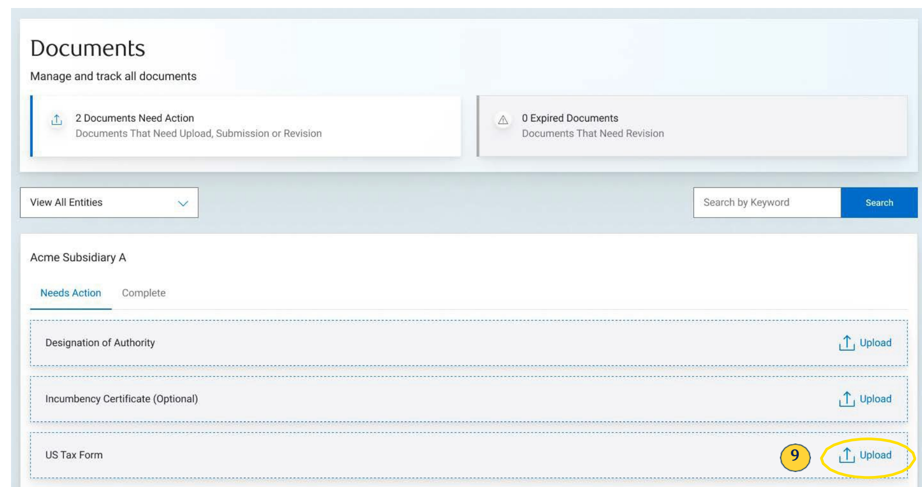
7a. On the bottom left click **Save Draft**.

7b. Then, once the tax form is uploaded to the "Documents" section, return to this page and click **Submit for Activation**. Please note, while the account can be reserved, accounts and services will not be activated until all onboarding steps are completed.

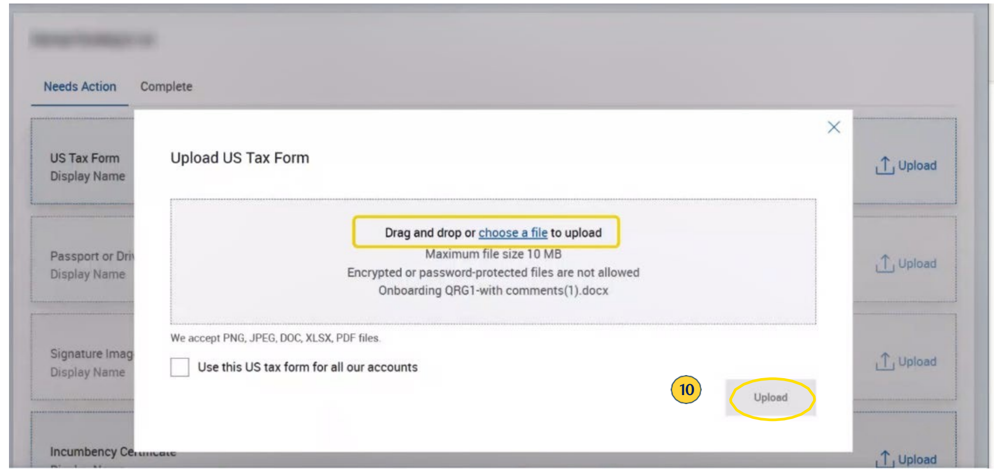
8. From the menu at the top of the screen, choose **Documents**.



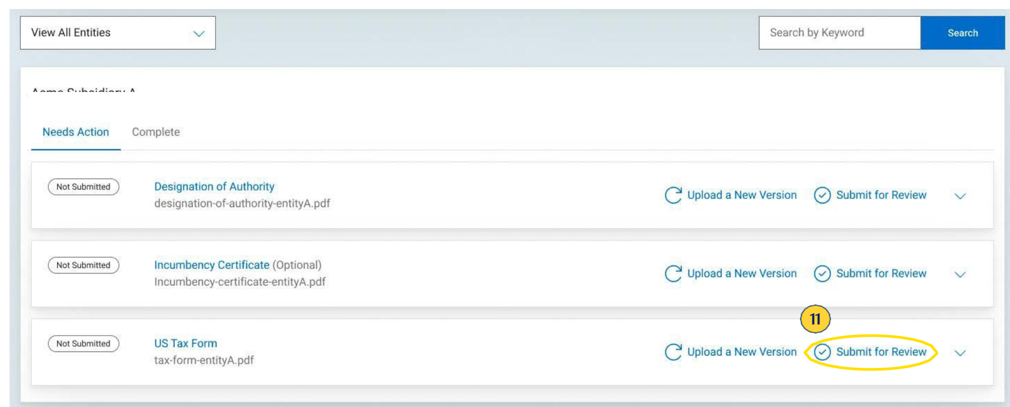
9. On the "Documents" page, under "Needs Action" section, click **Upload** to add each required document.



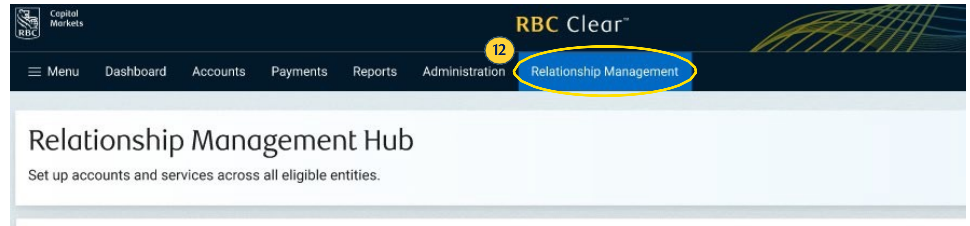
10. A screen will populate. Drag or drop the correct file into the box and click **Upload**. The pop-up screen will then disappear.



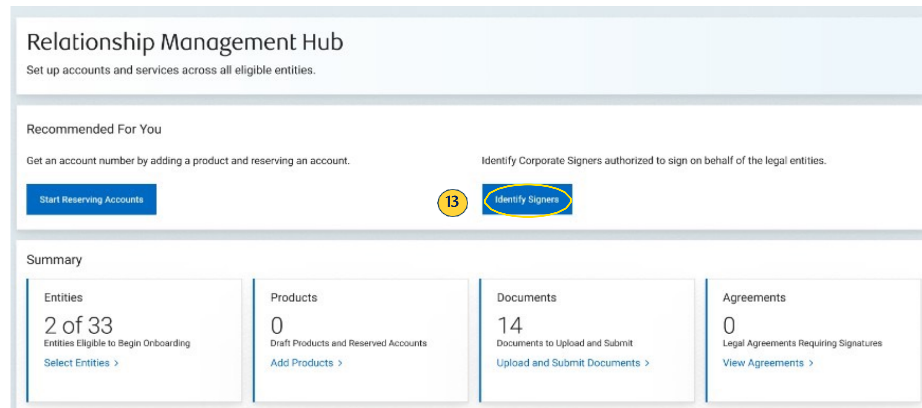
11. On the right side of the page click **Submit for Review** for each document and the document's status tag will change to "Under Review".



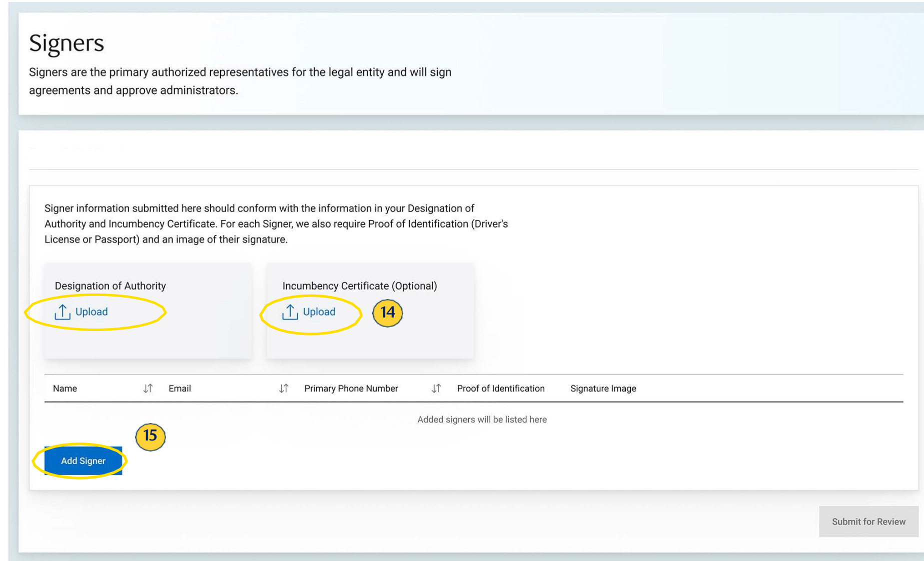
12. After the documents are uploaded, click the **Relationship Management** tab at the top of the screen.



13. In the "Recommended for You" section, click **Identify Signers**.

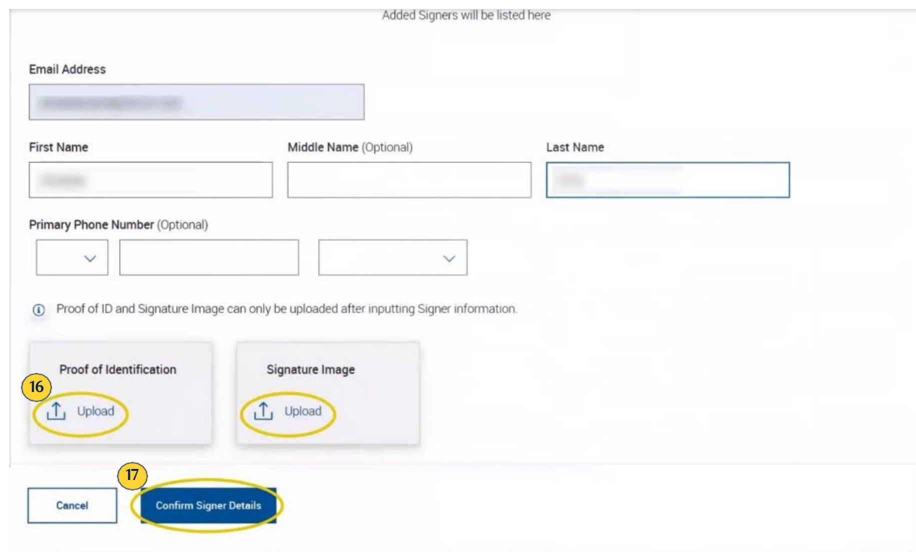


14. First, at the top of the "Signers" page, click **Upload** to add the **Designation of Authority** and **Incumbency Certificate** files.



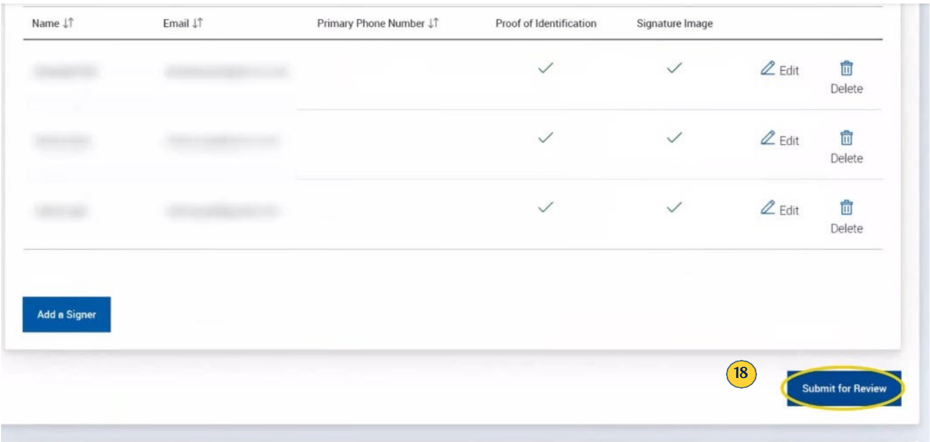
15. Click **Add Signer** to enter signer information.

16. Once documents are uploaded, fill out the section with the signer's email address, first and last name, and phone number.

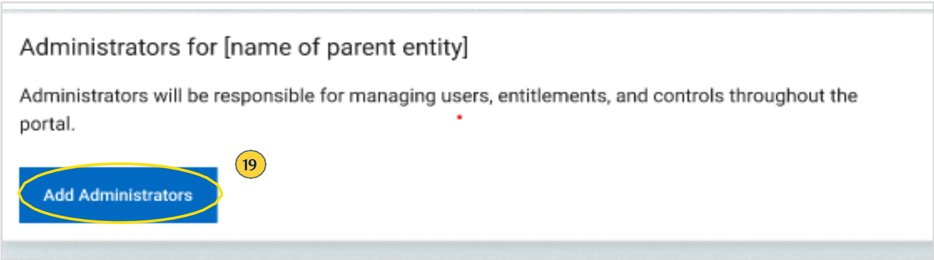


17. At the bottom of the screen click **Confirm Signer Details**.

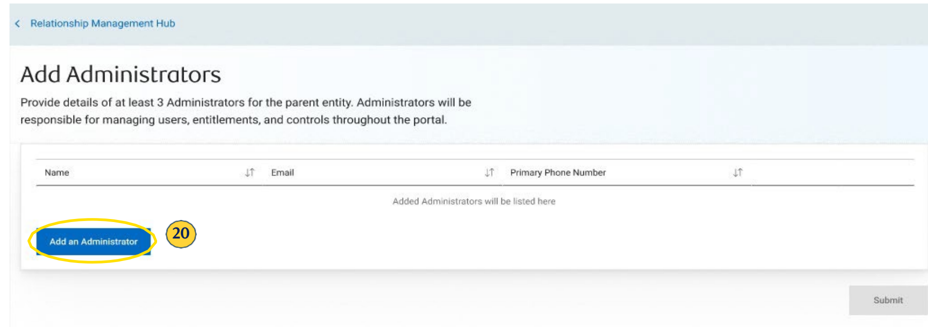
18. Repeat this process for each additional signer for a minimum of one signer, then click **Submit for Review.**



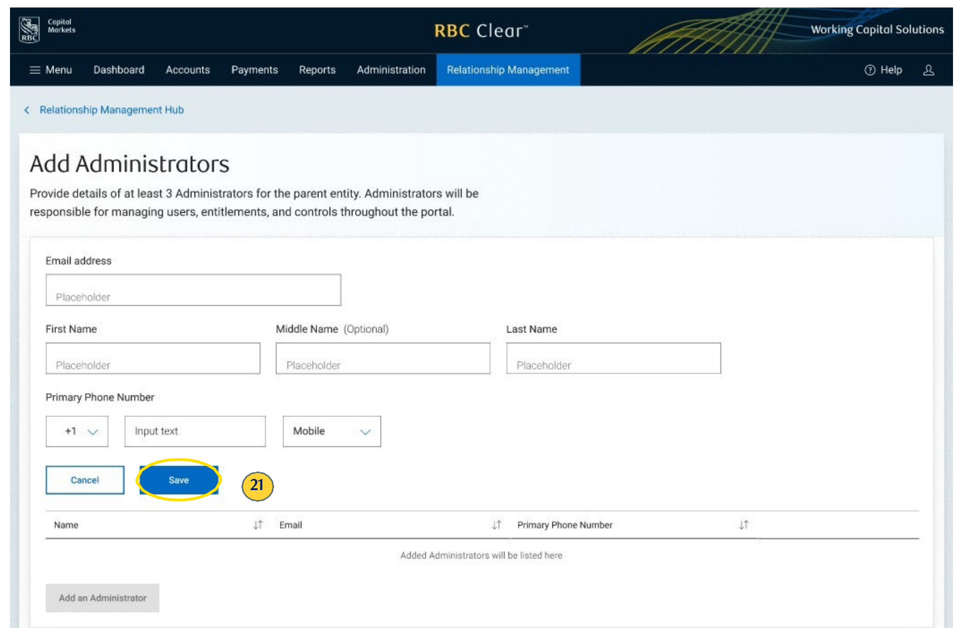
19. Next, click the **"Relationship Management"** tab and scroll down to the "Administrators Section" to click **Add Administrators**.



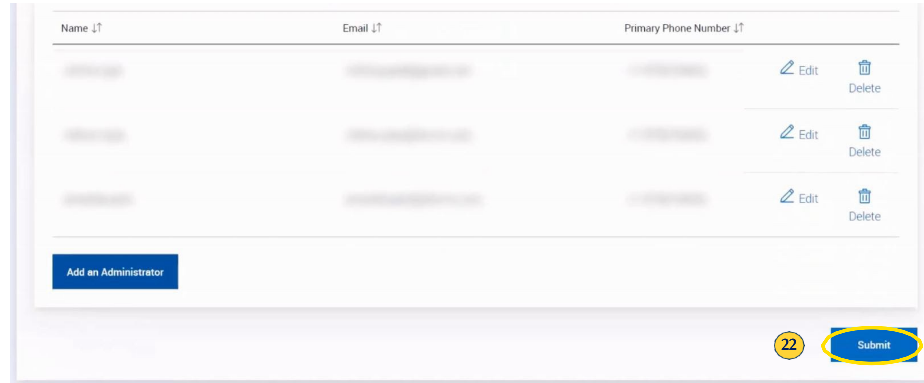
20. Once on the “Add Administrators” page click the **Add an Administrator** button at the bottom left of the screen.



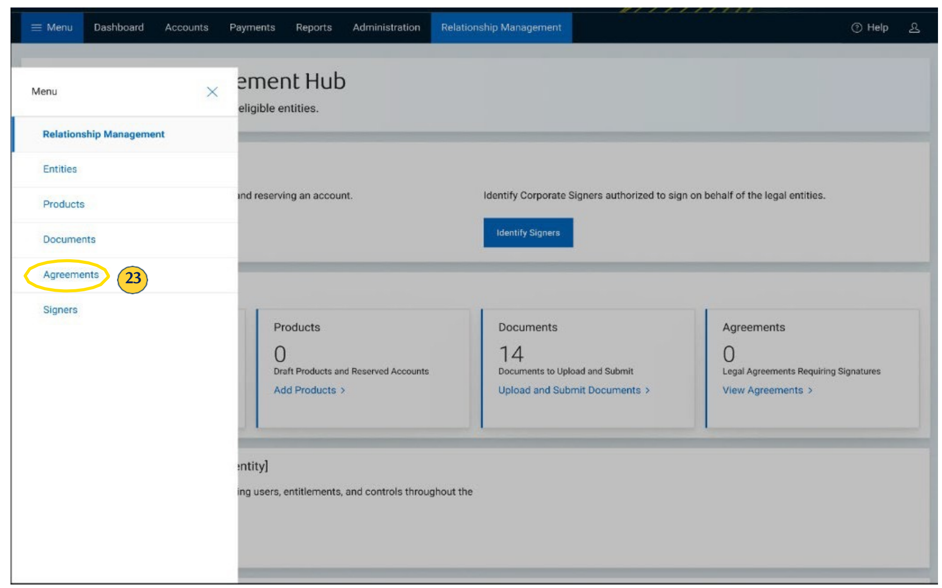
21. Fill out all required information and click the **Save** button.



22. Repeat this process until there are a minimum of three administrators, then click **Submit**.

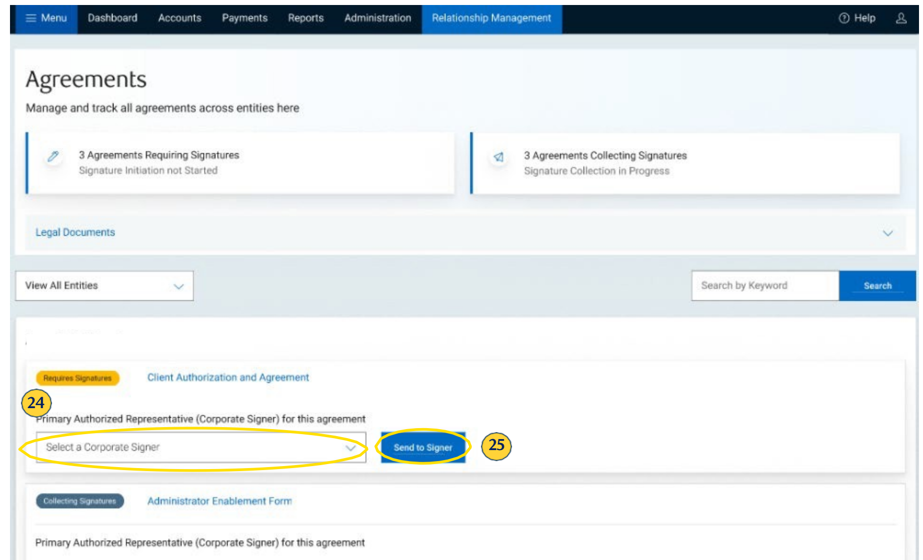


23. Under the **"Relationship Management"** tab, click on **Agreements**.



24. From the drop down select a **Corporate Signer**.

25. Then click the **Send to Signer** button. The signer will then be notified by email a document needs their signature.



26. Click the **Relationship Management** tab.

27. Scroll down to view **Onboarding Progress**.
    Once the account and service are active you will be notified by email and in-portal notification.