AccountPlus®

AccountPlus® Service Frequently Asked Questions

What is the *AccountPlus* Service?

The *AccountPlus* Service is a feature that provides financial institutions and their clients with an online tool that extends beyond the financial institution boundary. Products held directly with the institution and strategic partners can be consolidated and displayed through Internet Banking Integrated and Internet Banking Online.

Who are the *AccountPlus* Service (Credential) partners?

There are three Credential partners. They are:

- Credential Asset Management Inc.
- Credential Securities Inc.
- Credential Direct

Where do I find my client number?

On the Add Investment Account page, click on the link titled "Where can I find this?" A pop-up window will show an example of where you can find your customer number.

Can I remove the link to an individual account held with one of the financial partners?

No. When you choose to remove investment accounts, all of the accounts held by the financial partner selected will be removed.

The 'Link Accounts' hyperlink is not displaying on the Account Summary anymore, how do I link more accounts?

The 'Link Accounts' hyperlink only will display until the first account is linked. To link any subsequent accounts, you can access the use Manage Investment Accounts in Internet Banking located as follows:

Online:
Under the My Profile tab, click Manage Investment Accounts and select the required financial partner.

Integrated:
Under Account Services, click Manage Investment Accounts link and select the required financial partner.

Can I link accounts owned by an organization?

No, only personal accounts can be linked at this time.

Can I link both my sole and joint *Credential Direct*® Accounts?

No, you can only link either your sole OR your joint accounts, not both.