

# New Scotia<sup>®</sup> Online

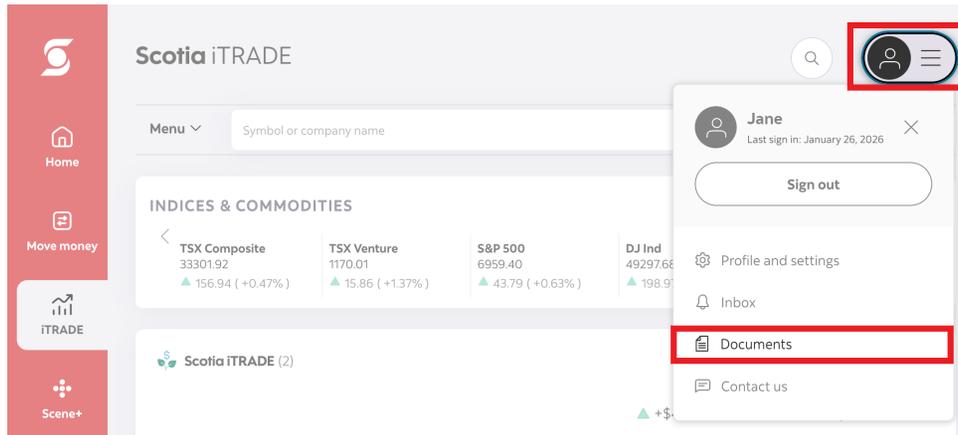
## How to Access Documents

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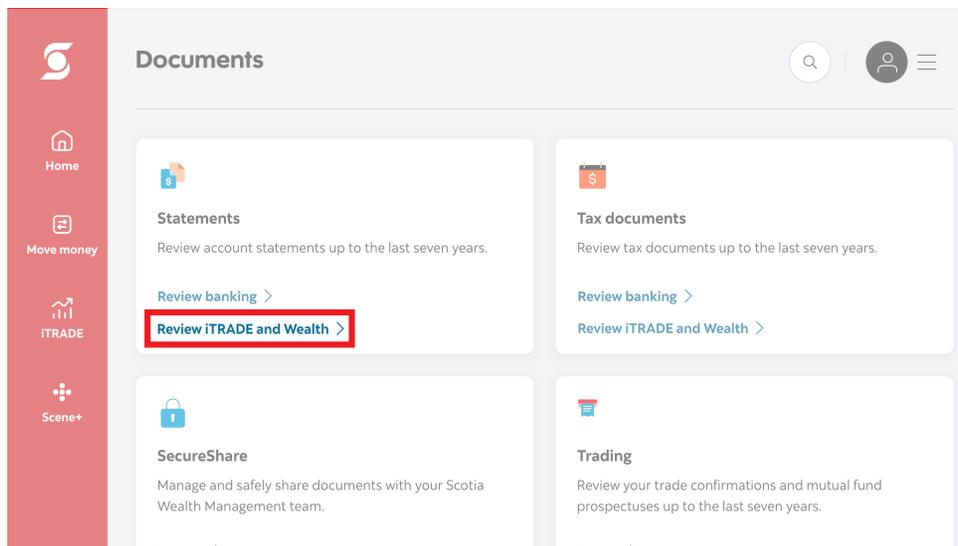
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# Accessing Scotia iTRADE® Documents

Statements, Trade Confirmations, Tax documents and SecureShare



**1** Documents can be accessed from the **top right menu**, then select **Documents**.



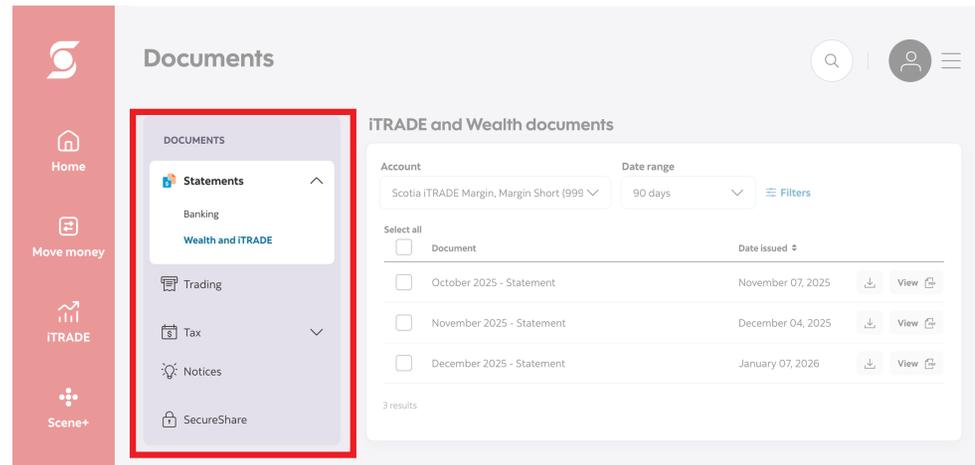
**2** From there, you can see different document types available.

Select **Review iTRADE and Wealth** under the document type you want to view.

# Accessing Scotia iTRADE® Documents

3 Use the **left-hand menu** to switch between different document types.

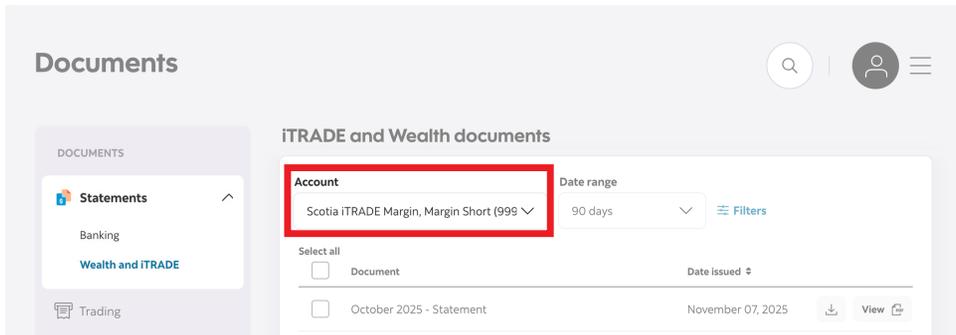
(Statements, Trading, Tax and SecureShare).



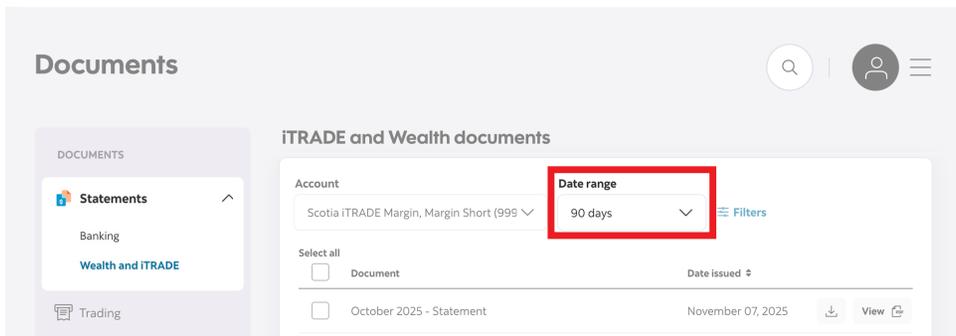
# Statements

The **left-hand menu** shows the document category you are viewing.

When you select **Statements** then **Wealth and iTRADE**, you will see the iTRADE Statements page.



- 1 To view statements for a specific account, open the **Account drop-down menu** and select an account.



- 2 To view statements from a specific period, open the **Date range drop-down menu** and choose a date range.

# Statements

The screenshot shows the Scotia iTRADE interface. On the left is a sidebar with 'Documents' and categories like 'Statements', 'Banking', 'Wealth and iTRADE', 'Trading', 'Tax', 'Notices', and 'SecureShare'. The main area is titled 'iTRADE and Wealth documents'. It includes an 'Account' dropdown (Scotia iTRADE Margin, Margin Short (999)), a 'Date range' dropdown (90 days), and a 'Filters' button. A red box highlights the 'Filters' dialog box, which contains a 'Custom date range' section with 'From date' (2025/10/28) and 'To date' (2026/01/26) fields, and a 'Document type' section with checkboxes for 'Account Statements' and 'Performance & Fee Statements'. Below the dialog is a table of results with columns for 'Document' and 'Date issued'. A red box highlights the 'Download' and 'View' icons for each row. The table shows three results for 2025 statements.

Document	Date issued	Download	View
October 2025 - Statement	November 07, 2025	↓	View
November 2025 - Statement	December 04, 2025	↓	View
December 2025 - Statement	January 07, 2026	↓	View

**3** To narrow your results further, select **Filter**, enter your criteria, and select **Apply**.

Matching documents will appear in the results list below.

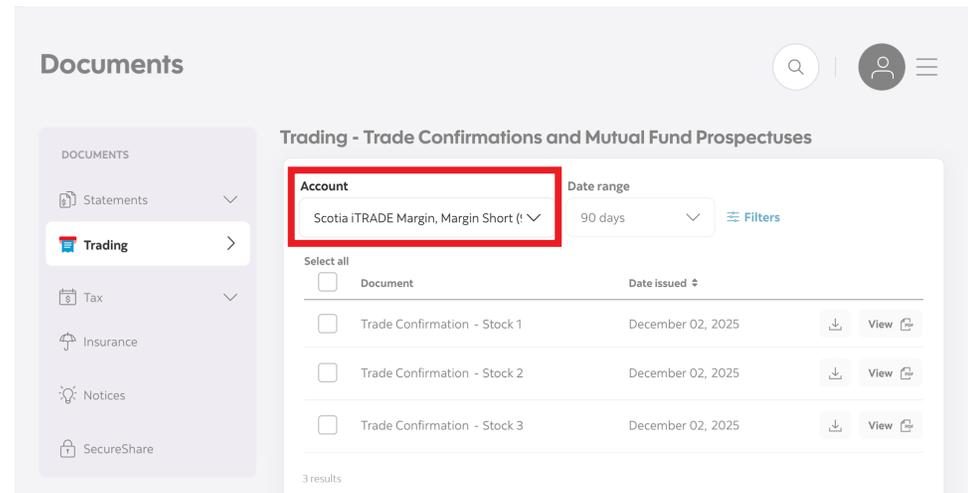
**4** Select the **download** icon to save the PDF, or select the **view** icon to open it.

**Note:** Statements are issued monthly when there is activity in your account or if you held an unexpired or unexercised options contract during the month. If there is no activity, statements are issued quarterly.

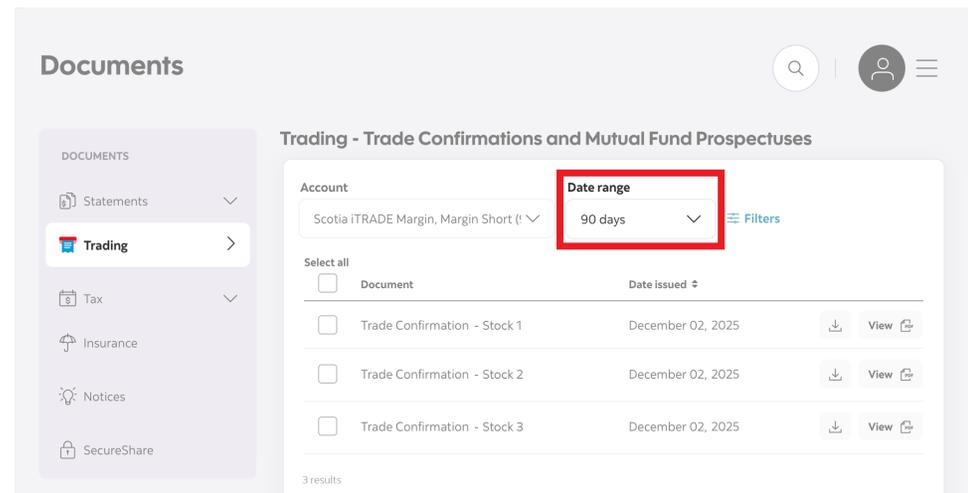
# Trade Confirmations

The **left-hand menu** shows the document category you are viewing. When you select **Trading** you will see the Trading documents page.

- 1 To view documents for a specific account, Open the **Account drop-down menu** to select an account.



- 2 Open the **Date range menu** to choose a time period.



# Trade Confirmations

The screenshot displays the Scotia iTRADE 'Documents' page. The left sidebar lists document categories: Statements, Trading (selected), Tax, Insurance, Notices, and SecureShare. The main content area is titled 'Trading - Trade Confirmations and Mutual Fund Prospectuses'. It features search filters for 'Account' (Scotia iTRADE Margin, Margin Short (999)) and 'Date range' (90 days). A 'Filters' dialog box is open, showing 'Custom date range' (From date: 2025/10/28, To date: 2026/01/26), 'Document type' (Trade confirmations selected), and 'Search symbol' (ETF1). An 'Apply' button is visible in the dialog. Below the dialog, a table lists search results:

Select all	Document	Date issued	
<input type="checkbox"/>	Trade Confirmation - ETF1	December 02, 2025	

1 result

3 To further narrow your results, select **Filter**, enter your criteria, and select **Apply**.

Matching items will appear below.

4 Select the **download icon** to save the PDF, or select the **view icon** to open it.

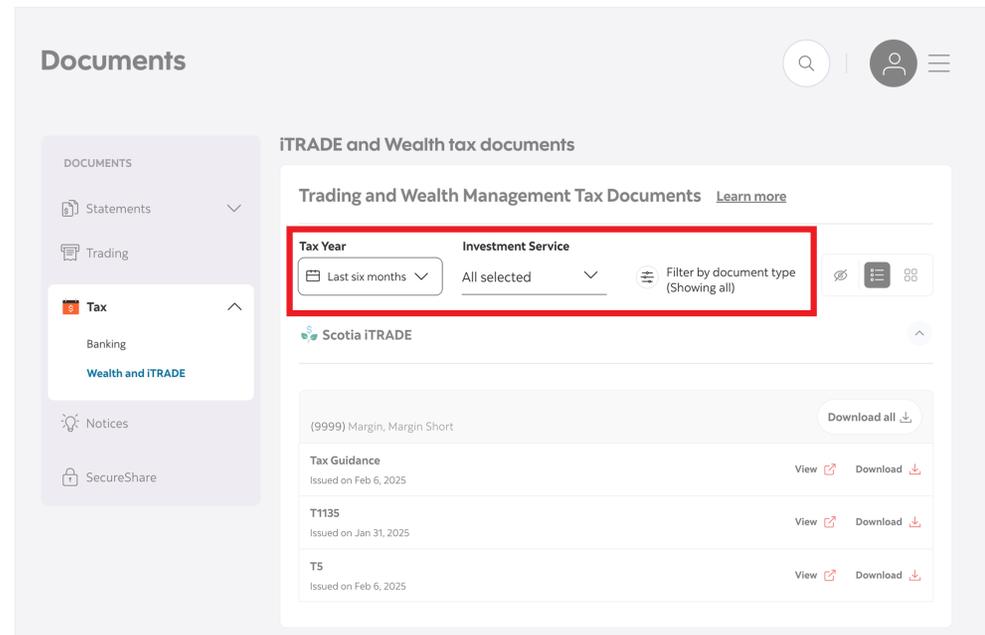
**Note:** Trade confirmations are available a day after a trade is filled.

# Tax Documents

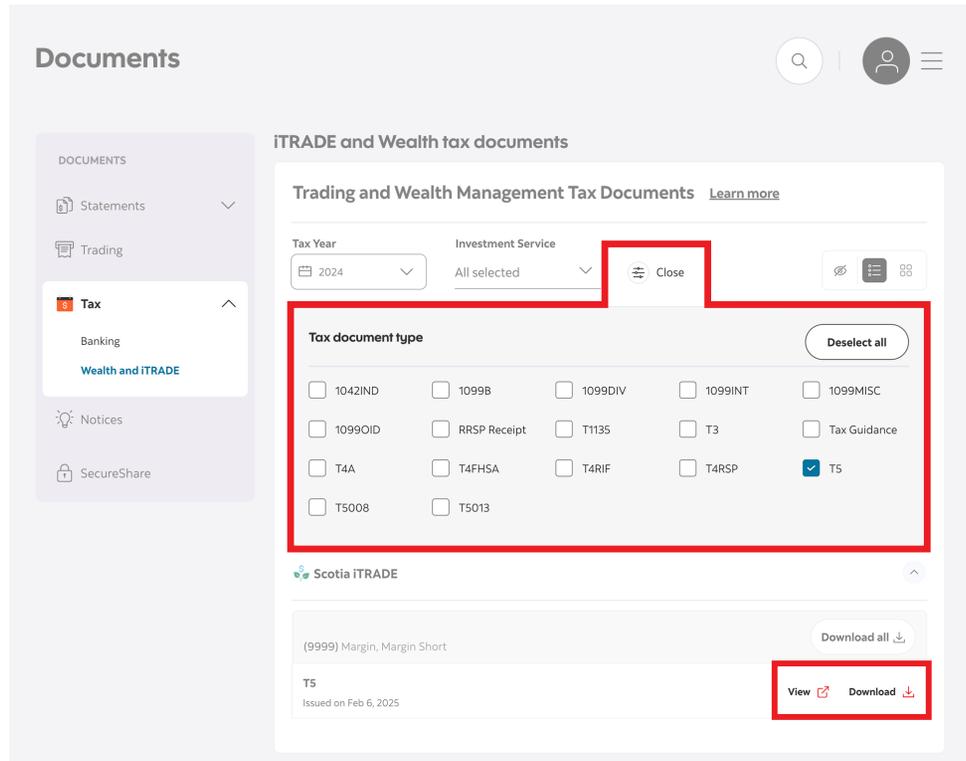
The **left-hand menu** shows the document category you are viewing.

When you select **Tax**, then **Wealth and iTRADE**, you will see the iTRADE Tax documents page.

- 1 Use the **drop-down menus** to filter by **Tax Year** or **Investment Services**.
  - 2 To locate a specific tax document type, select the **Filter** icon.
- A list of available document types will appear.



# Tax Documents



- 3 Select the document type(s) you want to view.

Matching documents will automatically appear below.

- 4 Select the **download icon** to save the PDF, or select the **view icon** to open it.

**Note:** Tax documents are made available according to regulatory deadlines. A **NEW** label will appear beside any document you have not viewed or downloaded.

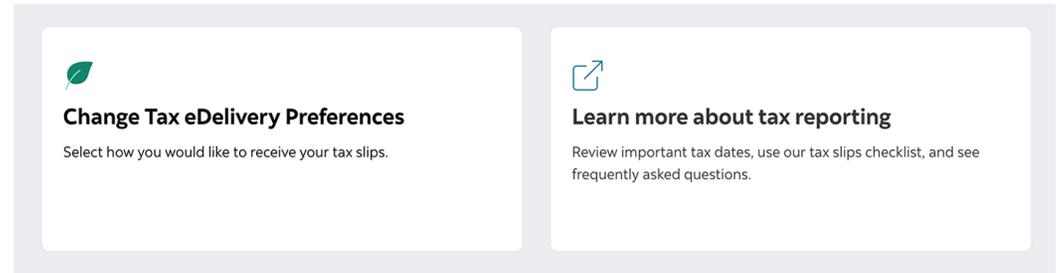
# Tax Documents

Additional options are available at the bottom of the Tax Documents page.

To adjust your delivery preference, select **Change Tax eDelivery Preferences**.

Any updates will also apply to mobile.

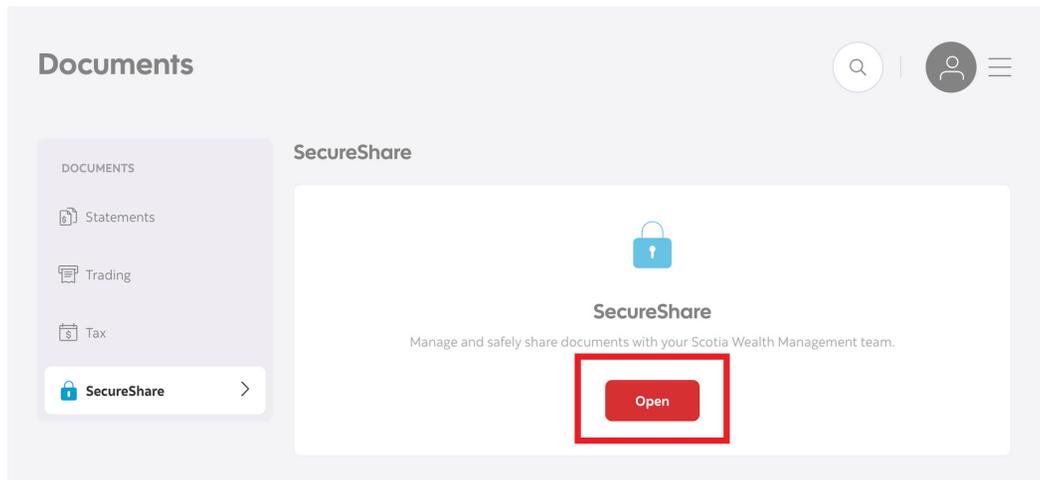
Select **Learn more about tax reporting** to view important dates, checklists, and FAQs.



# SecureShare

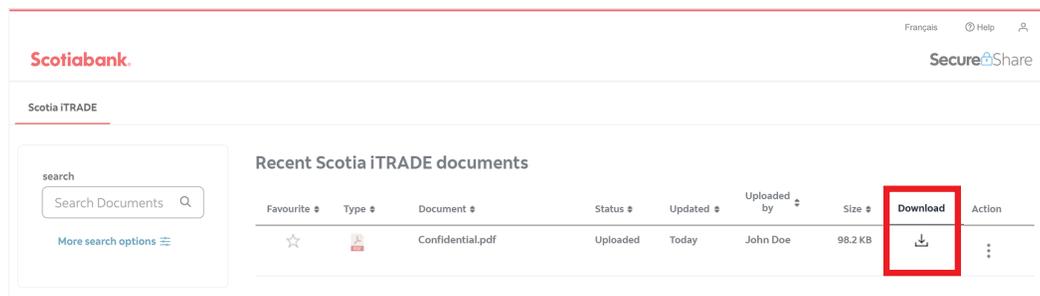
SecureShare is a secure tool that lets you safely receive important files from us. It provides a confidential, encrypted way for you to safely access information we share.

The **left-hand menu** shows the document category you are viewing.



1 Select **SecureShare**, then select **Open**.

This will take you to a new window.



2 Select the **download icon** to save the PDF.