Get Started with Scotia iTRADE®





Opening an account can take some time, but our helpful tips below could help make the process easier for you.

What You Need:



1. Social Insurance Number (SIN)



2. Photocopy of identification; both sides of Driver's License



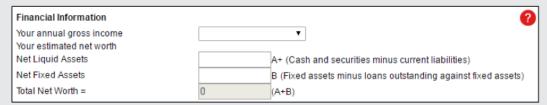
3. Pre-printed personalized cheque from each account holder payable to Scotia iTRADE; minimum of \$1 for Anti-Money Laundering requirements (This step is not required if you have an existing Scotiabank account)



4. Copy of Statement for any accounts you wish to transfer to Scotia iTRADE

Helpful Tips For You:

- Ensure you include a mailing address
- ✓ Input all fixed assets on "Client Info" page



- The account opening form will ask you to fill in your banking account information more than once; don't forget to enter it in both times
- "How did you hear about us?" Your promo code for this section will be **ADVMKT** unless you have a special promotion code
- ✓ Don't forget, after you select "Print Summary" to print your application, you must also press "SUBMIT" in order for your account to be processed



Don't delay in sending all signed documents immediately so you can begin trading on your account.



Some Key Definitions:

Single account: Owned by one individual: as the owner, you are the only one entitled to

control your account and assets.

Joint account: An account operated and owned by two or more who jointly share control

of the account and assets.

Example: You and your spouse open an account together; you are equal in

controlling and operating the account.

Power of attorney (POA):

The account owner appoints another person to act as the account operator on their behalf. A legal POA is used to have full account access and requires legal documentation. A regular POA allows money movement within the account and requires a signature from the account holder.

Example: A family member is diagnosed with Dementia, they give you control of

their account to act in their best interest.

Trading authority: A specific level of access granted to another individual on your behalf.

Example: You provide your spouse authorization to trade within your account.

Guarantor: Someone who certifies all information provided is legally correct.

Example: Your neighbor signs as guarantor on your passport application.

Interested Party: A business or individual who will be involved in legal matters.

Example: Your lawyer or business partner.

