



TD Wealth | Ready for you



TD Digital Vault





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How do I Log In?

Welcome to TD Bank Group (TD) Digital Vault!

TD Digital Vault is an approach to document management that delivers organization, storage, and easy access to important financial documents on your terms. Your advisor¹ can view and upload documents, which are shared with you in a safe, and secure manner.

How it works:

The simple design is easy to use and has specific folders, which can help you stay organized, or you can simply upload documents to the 'document drop' and sort later. In addition to uploading documents, you can respond to file requests as well as upload and store your own records.

Getting started with TD Digital Vault:

First Time Login

- 1 You will receive **an email** from TD Digital Vault advising that your TD Digital Vault is now available and ready to use.
- 2 Access your TD Digital Vault:

coming soon!

3

You will be prompted to login to TD Digital Vault using your existing WebBroker credentials (**Username** or **Access Card** or **Connect ID** and password).

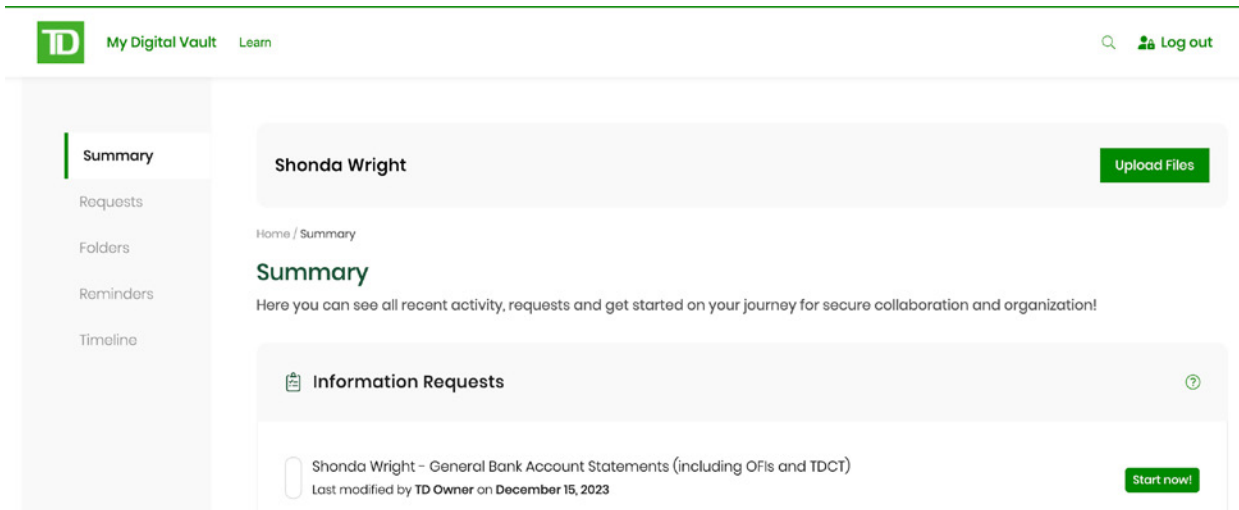
What if I forget, or want to reset, my TD credentials while logging into Digital Vault?

You can't reset your TD username or password from the authentication page for Digital Vault. Please visit WebBroker or other TD platform Login pages and follow the instructions. Alternatively, '[Contact Us](#)' for additional support.

4

You will receive a **one-time password** via telephone or SMS text message or the TD Authenticator App. Enter your one-time password to continue to your TD Digital Vault.

- 5 Review the TD Digital Vault Overview and click '**Continue**' to proceed.
- 6 Review and if you agree, accept the Terms and Conditions and click '**Continue**' to proceed.
- 7 Proceed to your newly created TD Digital Vault.



Your TD Digital Vault is ready to go! You can now login to TD Digital Vault any time.

Subsequent Login

- 1 Visit TD Digital Vault.
- 2 Sign in using your existing TD credentials.
- 3 Start using your TD Digital Vault!

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Responding to an Information Request

Ready to complete your first information request? We've got you covered.

An Information Request is a feature that allows advisors¹ to ask you, their client, for specific documents, files, and details they need to complete their work.

When your advisor requires documents or additional information from you, the advisor will send you an information request. This request will specifically outline what you need to provide, whether it be answering questions or providing files such as a will, insurance documents or Notice of Assessment.

Here you will see how to locate the information request and how to complete the request.

Responding to an Information Request

- 1 When your advisor sends you an information request, you will receive an email advising you of the pending request.
- 2 Access your TD Digital Vault. Visit WebBroker or your advisor's website (*coming soon!*).
- 3 Once in your Digital Vault, on the Summary page you will see any pending information requests and can easily action these requests.

The screenshot shows the TD Digital Vault interface. At the top, there is a navigation bar with the TD logo, 'My Digital Vault', and 'Learn'. On the right side of the navigation bar, there is a search icon, 'English', and a 'Log out' button. The main content area is divided into a left sidebar and a main panel. The sidebar contains a 'Summary' section with sub-items: 'Requests', 'Folders', 'Reminders', and 'Timeline'. The main panel displays the user's name 'Shonda Wright' and an 'Upload Files' button. Below this, there is a 'Summary' section with the text: 'Here you can see all recent activity, requests and get started on your journey for secure collaboration and organization!'. The 'Information Requests' section is highlighted, showing a list of requests. The first request is 'Shonda Wright - General Bank Account Statements (including OFIs and TDCT)' with a 'Start now!' button and 'Last modified by TD Owner at 12:01'. The second request is 'Pre-Meeting Questionnaire - 2024-01-19' with a progress indicator of '18%' and 'Last modified by TD Owner at 9:28'.

- 4 For additional details, select the 'Requests' tab on the left. This will open a menu that has all existing requests whether new, pending or completed.
- 5 Click on the title of the request you would like to respond to or [Start now!](#)
- 6 Requests for information can come in the form of requests for documents or various questions that require a specific answer, like request for an address, a date of birth or a numerical value. Complete the necessary fields in the information request.

Summary

Requests

Folders

Reminders

Timeline

Shonda Wright
Upload Files

Home / Information Requests / Private Investment Advice / Review

Pre-Meeting Questionnaire – PIA – 2023-01-23 18%

Look forward to our upcoming meeting!

Please kindly respond to the below so that I can update your profile and plan accordingly.

Has there been any life events or changes in your personal circumstances you will like to discuss?

No

Yes (please indicate) _____

Reset selection

✓ **Has there been any change in your financial situation, employment, or income status?**

No

Yes (please indicate) _____

Reset selection

TAX MANAGEMENT

What is your available RSP contribution room?


Enter your response *

What is your available TFSA contribution room?

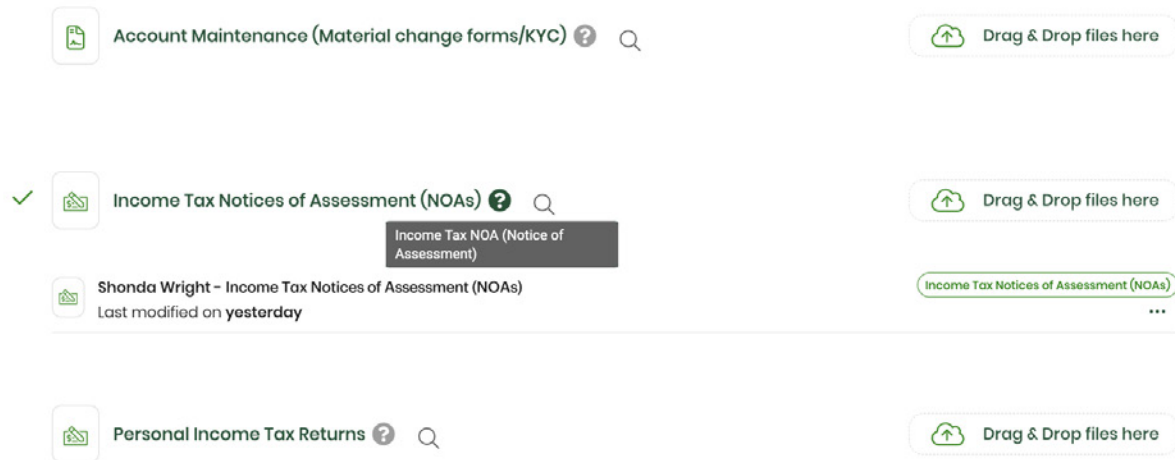
Enter your response *


Are there any tax related matters / concerns that you need to discuss with me?



Enter your response *

- 7 Some information requests will ask you to attach files. The name of the file and record type (ex. Will) will be easily visible. You have two options: you can select the title and upload your file or 'drag & drop' your files.
- A  will indicate your attachment has been added and you will see the file added below.




Please upload your most recent documents here:






Account Maintenance (Material change forms/KYC) ? 🔍 

 Income Tax Notices of Assessment (NOAs) ? 🔍 

Income Tax NOA (Notice of Assessment)

 **Shonda Wright - Income Tax Notices of Assessment (NOAs)**
Last modified on yesterday  

 **Personal Income Tax Returns** ? 🔍 

- 8 Once added, if you would like to change the name of the file you've uploaded, select the title of your file and the  icon.
- 9 Once you have completed answering the questions and/or adding the requested files, the progress bar shows complete.

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How to Upload a File

TD Digital Vault is an easy place to store your important financial documents. You can upload your own files for safe keeping and share them with your advisor¹ as needed.

You can choose to add files directly to the Document Drop folder or you can select a Folder in which to store your documents.

Who can see my folders?

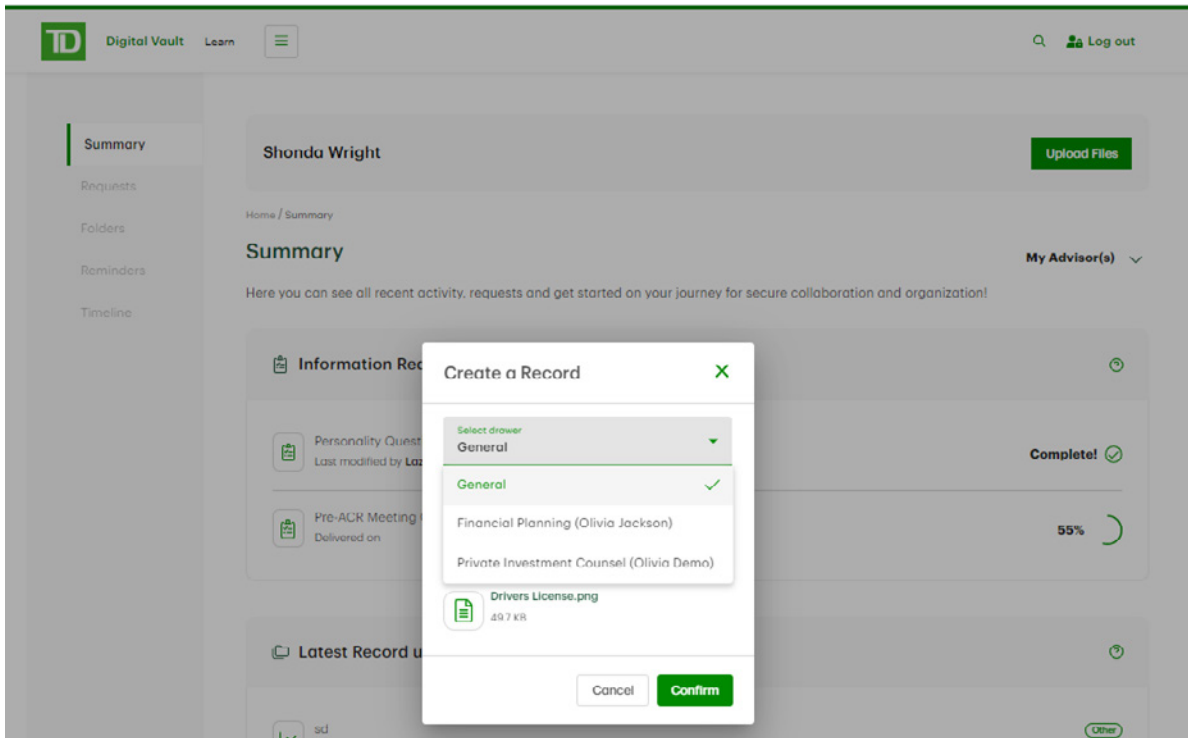
If you work with multiple advisors, you will see multiple groups of folders within TD Digital Vault, each with an advisors' name. Documents in your General folder are shared with all the advisors you work with. Documents shared in an advisor folder will only be accessible to that advisor. If you work with a single advisor, you will see a general folder and one with your advisor's name. Your advisor can see documents in both groups of folders.

- 1 Log into your TD Digital Vault.
- 2 Select **'Upload Files'** from the top right or drag and drop the file to the top of the page next to your name.



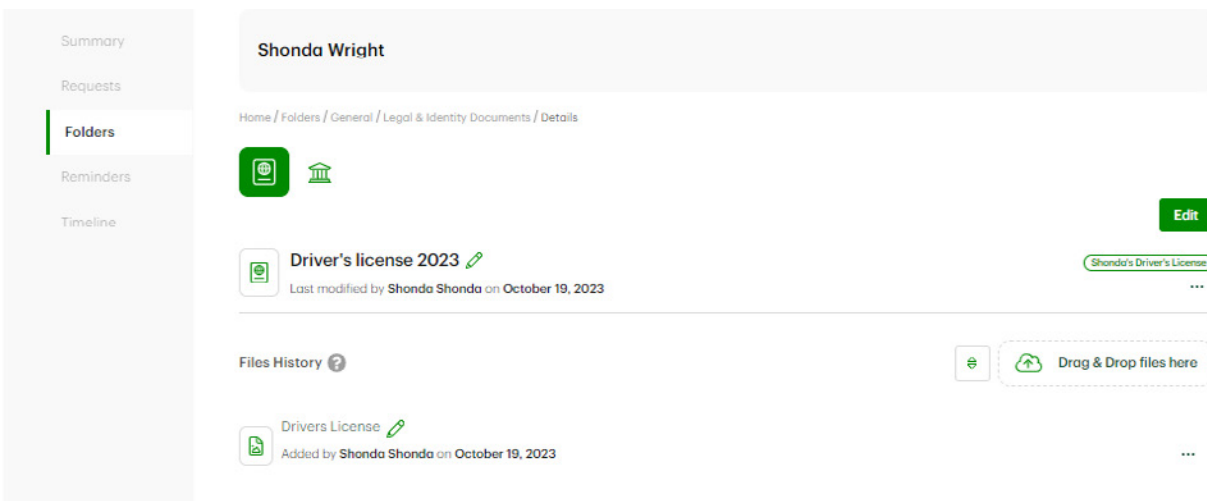
The screenshot displays the TD Digital Vault interface. At the top, there is a navigation bar with the TD logo, 'My Digital Vault', and 'Learn'. On the right side of the navigation bar, there is a search icon and a 'Log out' button. The main content area is divided into a left sidebar and a main panel. The sidebar contains links for 'Summary', 'Requests', 'Folders' (which is highlighted with a green box), 'Reminders', and 'Timeline'. The main panel shows the user's name 'Shonda Wright' and an 'Upload Files' button. Below this, there is a section for 'Home / Folders' with a 'General' folder icon. Under 'General', there are two folder cards: 'Banking & Credit' with a '2' badge and 'Legal & Identity Documents' with a '3' badge. Below the 'General' section, there is a section for 'Private Investment Advice' with a folder icon. Under 'Private Investment Advice', there are five folder cards: 'Document Drop', 'Account Documents', 'Insurance', 'Investments', and 'Tax Documents', all with '0' badges.

3 Select your advisor from the drop-down list and update the personalized name of the file, if needed.



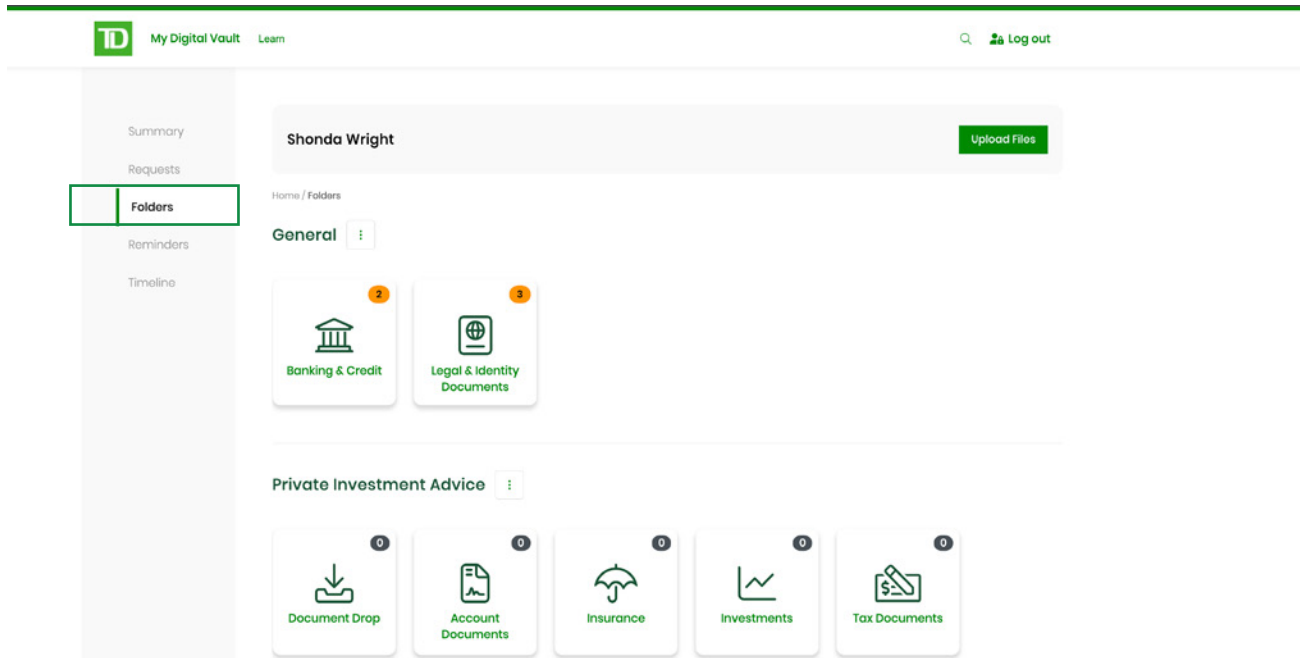
4 Select '**Confirm**' to complete your upload.

5 Once uploaded, the document is in the Document Drop folder with your advisor's name. Your advisor can view, store or download the document as necessary.

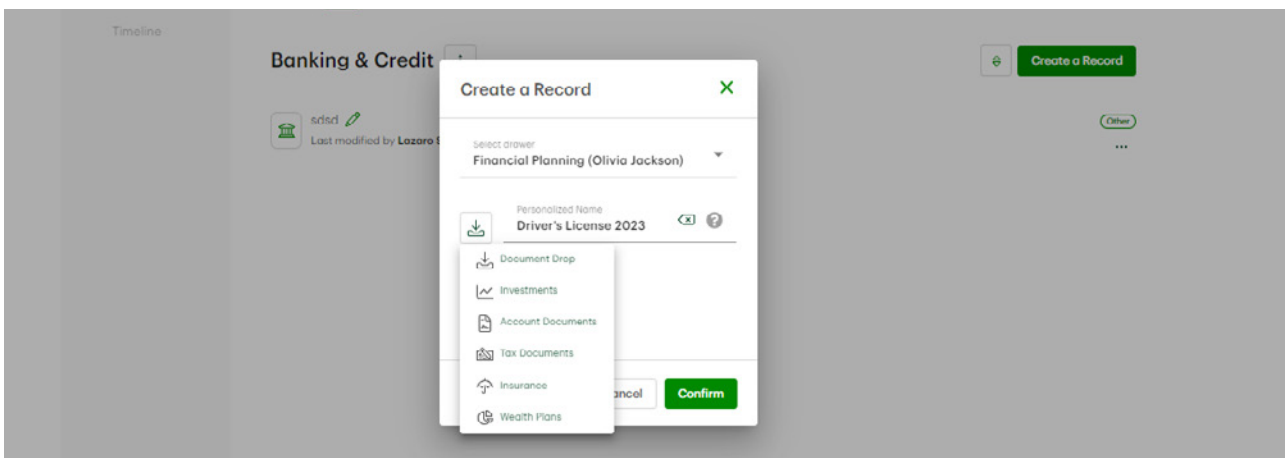


How to Upload a File to a Specific Folder

- 1 Log into your TD Digital Vault.
- 2 Select **'Folders'** from the left side navigation menu. Select the folder that best matches the document you'd like to upload.



- 3 Select **'Upload File'**.



- 4 Select '**Confirm**' to complete your upload.
- 5 The document is now saved in the folder you selected.

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Reminders

Have you added a document with an expiry date? Need to schedule a reminder to update one of your important documents? Reminders can help!

Using TD Digital Vault, you can add reminders for activities to help keep you organized and up to date. When you set a reminder, you will receive an email at that date and time. You can then access Digital Vault to review the reminder. For example, you can set a reminder to:

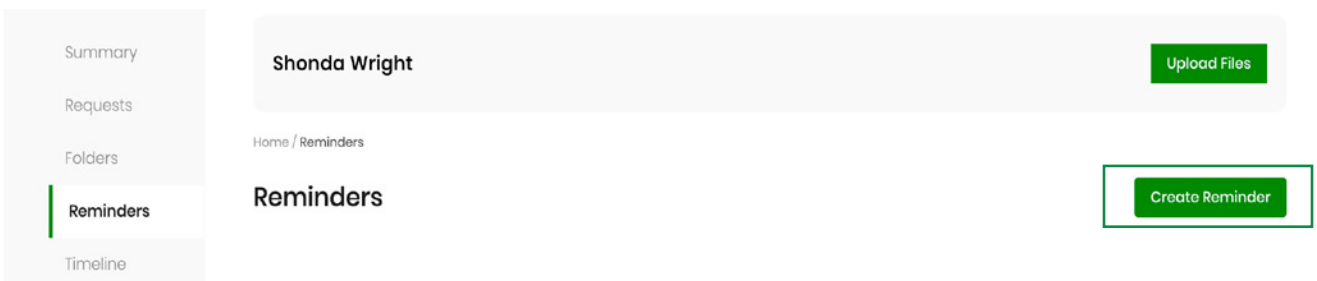
- **Upload a new copy of your Driver's License once the original expires**
- **Set a meeting with your lawyer to review your will**
- **Remind yourself to find and upload your insurance documents**

1 In TD Digital Vault, access your folders and find the location of the item you'd like to add a reminder to.



2 You can also navigate to the '**Reminders**' tab on the left.

3 Create a reminder or notification for the record by selecting the **+** on the Reminders section.



- 4 Customize your reminder by adding a personalized name (ex. Shonda's Driver's License expires 2028).

Shonda Wright Upload Files

Home / Reminders / Private Investment Advice

Reminder details

Customize this Reminder.

Private Investment Advice

Personalized Name ✕ ?

- 5 You can add a message with additional information to your reminder.

- 6 Lastly, set a date and time for the reminder to be delivered.

When do you want to send this Reminder?

Reminder ... 📅 1/19/2024 12 : 14 PM

- 7 You can also choose to add a recurrence to your reminder. This will send updates and remind you to complete this activity.

- 8 Once complete, select **'Save & Set Reminder'**.

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Frequently Asked Questions

What is TD Digital Vault?

What are the benefits of TD Digital Vault?

How do I register?

What is the cost?

What happens to my TD Digital Vault if I am no longer a TD Wealth client?

What can I put in my TD Digital Vault?

I already have Dropbox/OneDrive/Google Drive so why do I need TD Digital Vault?

Can I use TD Digital Vault outside of Canada?

Who has access to my sensitive documents?

Can my family members have access to my TD Digital Vault?

What do I do if I no longer want to use TD Digital Vault?

Where can I access TD Digital Vault support guides?

Why do the emails from TD Digital Vault not have clickable links that take me directly to the site?

Frequently Asked Questions

What is TD Digital Vault?

TD Digital Vault is an approach to document management that delivers organization, storage, and easy access to important financial documents on your terms. Your advisor¹ can view and upload documents, which are shared with you in a safe, and secure manner.

TD Digital Vault allows your advisor to securely request and share specific files or information that will be stored for your future use and reference.

What are the benefits of TD Digital Vault?

If you want to consolidate, organize, and safely store all your financial documents, on one secure platform, TD Digital Vault is for you! A wide range of documents can be saved, ranging from insurance documents, a will, property details, or a copy of your passport.

TD Digital Vault's features allow you to collaborate with your advisor. Your advisor can easily request specific files or documents. If your advisor uploads a document for you, you will receive an email notification advising you that there is a document available for viewing.

Sharing documents through unsecure email has increasingly become a cybersecurity risk. TD Digital Vault minimizes the risk associated with email attachments and unsecure file sharing.

Currently, there is no personal folder, meaning any documents added to your TD Digital Vault can be accessed by your advisor.

How do I register?

Your advisor will be happy to register you for TD Digital Vault. Once registered, you will receive a welcome email with additional information.

What is the cost?

As a TD Wealth Advice client, TD Digital Vault is provided to you at no cost.

What happens to my TD Digital Vault if I am no longer a TD Wealth client?

If you are no longer a TD Wealth client, your TD Digital Vault will be removed. If you only retain TD Direct Investing accounts, you will not have access to TD Digital Vault.

What can I put in my TD Digital Vault?

You can store anything you want to share with your advisor! TD Digital Vault is set up with multiple folders that allow you to organize and upload a variety of documents, including documents with details related to your vehicle, home, and investments. You can also use TD Digital Vault to store your will, statements, tax documents, identity documents and legal documents.

TD Digital Vault allows for a wide range of files including Excel, Word, PowerPoint, PDF, and pictures. Currently, zip files, videos, and executable files (ex. ends in 'exe') are not able to be stored.

I already have Dropbox/OneDrive/Google Drive so why do I need TD Digital Vault?

TD Digital Vault lets you securely share important documents with your advisor. The platform allows your advisor to request documents directly from you, allowing you to simply upload the document. Dropbox, OneDrive and Google Drive are all personal storage solutions, but TD Digital Vault provides you with a storage solution that allows you to collaborate with your advisor.

TD Digital Vault also allows you or your advisor to set reminders to aid in document management. Additionally, for documents that have expiry dates, such as a driver's license, you can create reminders to upload an updated version.

Can I use TD Digital Vault outside of Canada?

Yes, TD Digital Vault can be used while travelling outside of the country. The platform is accessed through your secure WebBroker account, or your advisor's website.

Who has access to my sensitive documents?

Only you, and your TD Wealth team can access your documents. Spouses, partners, and family members with TD Wealth relationships may have their own separate TD Digital Vault.

Can my family members have access to my TD Digital Vault?

No, at this time, your TD Digital Vault cannot be shared with family member and others cannot be granted access to your Vault.

What do I do if I no longer want to use TD Digital Vault?

If you no longer wish to have access to TD Digital Vault, inform your advisor and they will cancel your access to TD Digital Vault. Some required documents previously uploaded to your TD Digital Vault will need to be retained by your advisor. If you wish to retain any documents available in your TD Digital Vault, please ensure you download them prior to your access being removed.

Where can I access TD Digital Vault support guides?

Once you receive access to TD Digital Vault, our how-to guides are included in the **'Learn'** section of your TD Digital Vault. Select **'Learn'** at the top left of your Digital Vault to view resources.

Why do the emails from TD Digital Vault not have clickable links that take me directly to the site?

As a safe practice, when provided with the secure site's URL, always type the URL directly into the address bar and verify the website name to ensure you are visiting one of our secure sites. Also remember, at no time will TD ask you to reply to an email with account numbers, usernames, passwords, or PINs. For more information, visit [TD's Online Communication Policy](#).

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