

How to add a goal in MyAdvisor



Welcome to our step-by-step guide on how to add a goal in MyAdvisor®.



- 1 To begin, **log in to MyAdvisor** from RBC® Online Banking. For assistance, refer to our “How to log in to MyAdvisor” guide.

The screenshot shows the 'Sign in to Online Banking' section of the RBC website. It includes a dropdown menu for 'Client Card or Username' with an 'Add New Remove' link, a 'Recover your username' link, a 'Password' field with a 'Reset your password' link, and a yellow 'Sign In' button. To the right, there's a 'New to Online Banking?' section with a 'Discover what it can do for you.' link, and an 'Other Online Services' section with a dropdown menu showing 'RBC Direct Investing'. Below that is a 'How Can We Help You?' section with links for 'FAQs about signing in' and 'Report a lost or stolen card'. Annotations with yellow boxes and lines point to the 'Client Card or Username' dropdown and the 'Password' field.


- 2 Once you’ve logged in, from your MyAdvisor homepage, click **Add a Goal** at the top of the page.


The screenshot shows the MyAdvisor homepage. At the top, there's a navigation bar with tabs for 'Goals', 'Accounts and Net Worth', 'Expenses and Cash Flow', and 'Documents'. Below this is a sub-navigation bar with 'New Home', 'My Car Goal', and 'Retirement'. A yellow box highlights the 'Add a Goal' button in the sub-navigation bar. Below the navigation bar, the page title is 'Your Retirement Goal'. The main content area shows a summary: 'You told us that when you retire at the age of 65 you want to spend about the same in retirement. As a balanced investor, you're contributing \$300 a month toward your goal.' Annotations with yellow boxes and lines point to the 'Add a Goal' button.


3 Now it's time to identify what you are saving for by choosing 1 of 8 financial goals.


What are you saving for?


Select the financial goal you want to reach.



Home purchase



Education



Vehicle



Vacation


Wedding



Gift or donation



Me. Just me.



Something else



Vehicle


4 Once you've chosen your goal, **describe** it in the box below. When you're done, click **Add Details**.



Home purchase



Education



Vehicle


Vacation


Wedding


Gift or donation


Me. Just me.


Something else

Please select the goal you want to reach

Describe this goal

New Car

New Car

Please describe this goal

Add Details

Add Details

5 Here you will be asked a few questions about your goal. Don't worry if it's an estimate; you can change this at any time.

Is financing needed?

☒ Yes

☐ No


Target down payment

\$

15,000

When do you want to reach your goal?

2024



6 Select the account you will use to reach this goal. Then answer the questions presented.

Which accounts will you use to reach this goal?

Here are the available accounts we have on file for you.

Type	Balance	Contribution details
<input type="checkbox"/> Savings	\$2,186.99	\$0.00 Monthly
<input checked="" type="checkbox"/> Savings	\$9,817.60	\$0.00 Monthly

☒ Savings

When will you start to save?

I already save regularly

How much will you save annually?

\$ 5,000 per year

How long do you plan to save?

03 years

7 Now we want to learn about your investment style. First, **how much risk** are you willing to take?

Click the **button on the scale** that most applies to you. A detailed description for each button will appear to help you choose accurately.

Knowing that financial markets go up and down over time, how much risk are you willing to take with your investments?

Very Low

Low

Below Average

Average

Above Average

High

?

?

?

?

?

?

Why are you asking about this again?

Every goal is different and your risk tolerance can change depending on the type of goal, the time frame and the amount you want to save. Your answers will be used to calculate the projected rate at which your investments will grow. We'll review your responses during your advisor appointment.

Average

Average

I am willing to accept moderate fluctuation. Some growth and the potential for returns are important to me.

8 Next, is your objective **security or growth**? Click the **button on the scale** that most applies to you.

A detailed description for each button will appear to help you choose accurately. Click **Add Goal**.

Secure

Very Conservative

Conservative

Balanced

Growth

Aggressive Growth

?

?

?

?

?

?

Balanced

Balanced

I want a balanced combination of income and moderate investment growth. I can accept fluctuations in the value of my investments for the potential of higher returns.

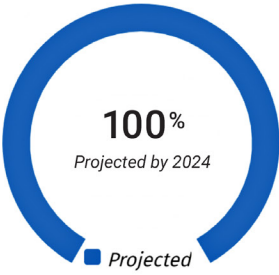
Cancel

Add Goal

Add Goal

9 You're all done! Click **Talk to an Advisor** to book an appointment or **I'll do this later** to go back to your homepage, where you will see the progress of the goal you've just set up.

All done,
New Car has been added to your financial picture. You've taken another step towards a brighter financial future. An Advisor can help you set up automatic contributions and reach your goal faster.



Your goal is in great shape!

If your contributions stay as is, you're projected* to receive approximately \$15,000 in 2024. That's 100% of your \$15,000 goal. See below for tips on how to optimize the extra investments you may have on hand.

^ * These projections are based on the information you provided.

You'll have a more accurate projection of your goal if you include:

- Additional RBC accounts
- External accounts

Need Advice?

