



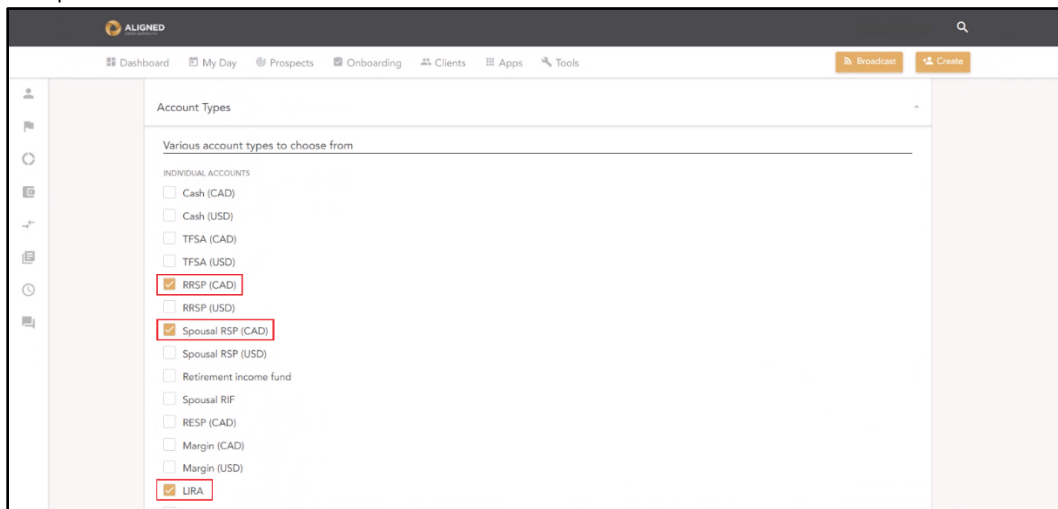
A360 Onboarding Announcement – December 16th

Separate Beneficiary Designation for RRSP, SRRSP, & LIRA

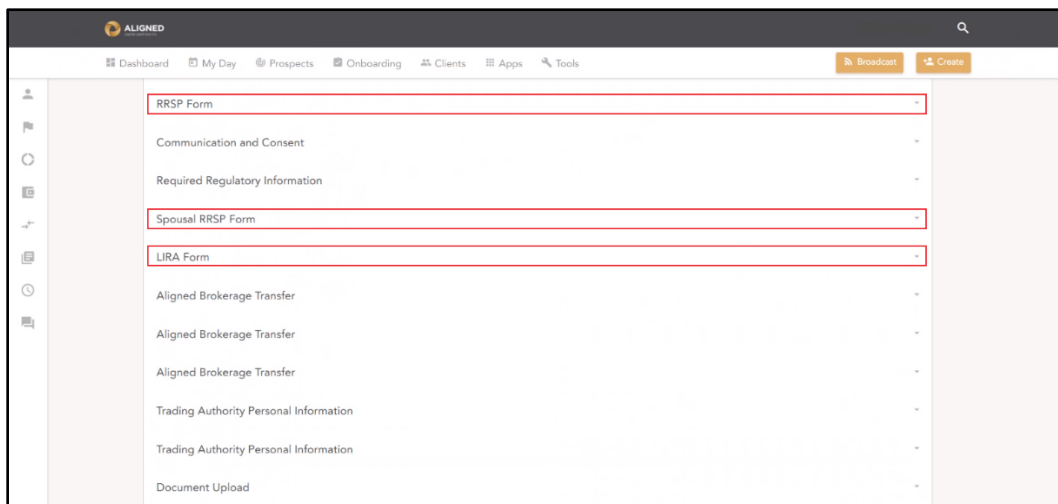
- When opening multiple accounts simultaneously, you can now designate separate beneficiaries for each account.

Steps to Take:

- Under Account Types, ensure you have selected the types of accounts that you would like to open



- Based on the account types you have selected, you will see the corresponding beneficiary sections





- When designating beneficiaries for each account you can select how many beneficiaries will be designated and their personal information.

The screenshot shows the 'RRSP Form' interface. At the top, there is a navigation bar with 'Dashboard', 'My Day', 'Prospects', 'Onboarding', 'Clients', 'Apps', and 'Tools'. On the right side of the navigation bar are 'Broadcast' and 'Create' buttons. The form itself is titled 'RRSP Form' and contains the following sections:

- HOW MANY BENEFICIARIES WILL BE DESIGNATED?**
Radio buttons for 'One' (selected), 'Two', 'Three', and 'I would not like to designate a beneficiary at this time'.
- First Beneficiary's Personal Information**
A horizontal line separator.
- SALUTATION**
Radio buttons for 'Mr', 'Mrs', 'Miss', 'Ms', and 'Dr'.
- FIRST NAME**
Text input field containing 'John'.
- LAST NAME**
Text input field containing 'Smith'.
- RELATIONSHIP**
Dropdown menu with 'Select...' and a downward arrow.
- ALLOCATION**
Text input field containing '100%'.
- DOES THE BENEFICIARY LIVE AT HOME?**
This section is partially visible at the bottom of the form.

- Select Finalize to save your changes!