

## Open a sub-account on desktop online banking

## What is "Open New Account"?

"Open New Account" is the ability to open sub accounts on desktop Member Direct.

The procedures for opening each product type differ slightly.

## Chequing account example:

After logging into On-Line Banking, select Account Services on the left-hand side menu bar and click on Open New Account.	Stride				
	Online Banking > My Accounts       My Accounts       Account Summary       Image: Degree site       Payments       Image: Degree site       Transfers       Account Name       Business Chequing 00109       Regular Chequing 00102       Regular Chequing 00103       Regular Chequing 00103				
	Regular Chequing 00105         Mobile Banking App           Profile and Settings         Regular Chequing 00107         Lock Your Debit Card           Profile and Settings         Regular Chequing 00107         Void Cheque				
On the Open New Account page, it lists the product types available. Once the type of product is selected, then select the account type to open. RSP or TFSA product options will not be visible unless the applicable contract (RSP or TFSA) is already open at Stride.	Open a New Account	0			
	Click on the type of the account you wish to open (savings, chequing, etc.).				
	Savings Accounts       Image: Chequing Accounts       Image: Term Deposits         RRSP Products       Image: Tax-Free Savings Accounts       Image: Tax-Free Savings Accounts	>			

Once type is selected from the	Ø	Online Banking > Account Services > Open a New Account		
list of chequing products, click	My Accounts		0	
"Open account".	00		U	
	Payments	Chequing Accounts		
	≓	To open a specific account, please click on the appropriate Open A	ccount link.	
	Transfers	Regular Chequing	+ Open account	
	Account Services	Minimum Balance Interest \$0.00 - \$999,999,999,99 0.000%	kate	
Fill out all fields on the Open A New	Online Banking > Acco	ount Services > Open a New Account		
left blank, an error will display	Open a New Account			
and will need to be filled in prior				
to moving to the next step.	You can make an initial deposit into your new account. To do so, enter the Initial Deposit Amount and select the appropriate Transfer From Account.			
Account Name defaults to	All fields required unless	indicated		
the product you are	Account Name		Initial Deposit Amount \$0.00 - \$999.999.999.99	
opening. Rename the	Regular Chequing			
account if desired <mark>(see</mark>	Transfer From Account			
second screenshot in highlighted vellow great	Select an Account	×		
mgmgmed yellow dredy	Intended Use			
Enter Initial deposit	Select an Intended Us	e ~		
Amount - this cannot be	Will this account be used	d by or on behalf of a third party?		
blank				
Select an Account from	Have you, or any family	member or close associate, now or at any time in the past, be	en employed as a senior official in a foreign state ("Foreign PEP")? Learn	
the dropdown list to	More			
Transfer From	O Yes			
	Have you, or any family	member or close associate, now or at any time during the pas	st five years, been employed as a senior official in Canada ("Domestic PEP")?	
<ul> <li>Select Intended Use from the drendown list. This is</li> </ul>	Learn More			
reauired.				
	Are you, or any family m	ember or close associate, currently employed as the head of	an international organization or the head of an institution established by an	
Answer the 5 questions	Ves	n ('HIO') Learn More		
presented. <i>If the answer</i>	O No			
auestions is "Yes", you	Are you a tax resident of a country other than Canada or the United States? Learn More			
will receive an error	O Yes			
message and will not be	O NO			
able to open the account	Cancel	Continue		
onune. You wuu have to visit a branch				
	Open	a New Account		
Once all fields have been filled out,				
cick continue.	You can m	ake an initial deposit into your ne	ew account. To do so, enter the Initial Deposit	
	All fields re	quired unless indicated		
	Account Na	ame	Ini	
	Daily bar	iking CA		
	Transfer Fr	om Account		
	Select an	Account	~	
	Intended U	se		
	Select an	Intended Use	~	

Details of the account to be opened is displayed. Confirm to create the account or select cancel if there is an error.	Online Banking > Account Services > Open a New Account Open a New Account	0
	Account Name     Daily banking CA       Initial Deposit Amount     \$25.00       Transfer From Account     Regular Chequing 101	
If "confirm" is selected, the new account is opened, The account is now ACTIVE and linked	Online Banking > Account Services > Open a New Account Open a New Account - Receipt	0
automatically in On-Line banking.	Go to My Accounts     Open Another Account     Success      Member Card Number I      You have successfully opened your new Chequing Account Daily banking CA with an opening balance of \$25.00.	Print Receipt       Date     Wednesday, January 15, 2025       ).