Bulk File Upload Trust Beneficiaries

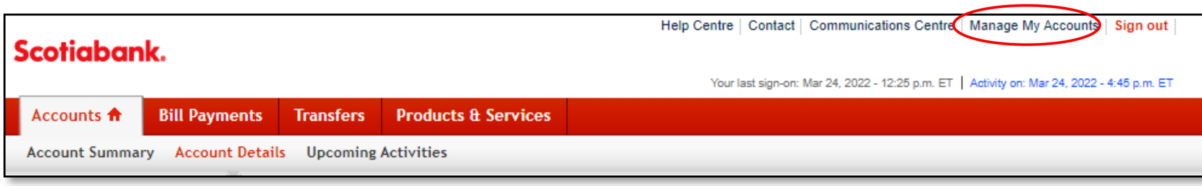
Quick Reference Guide

OVERVIEW

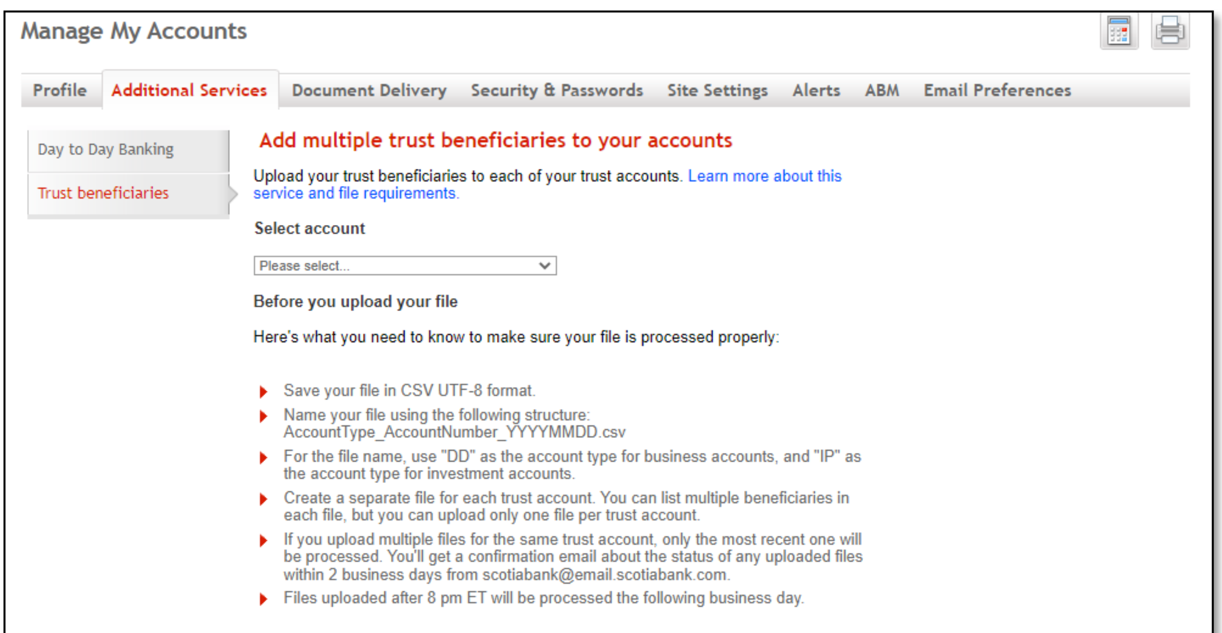
Scotia OnLine customers can upload a file that contains trust beneficiary information (i.e., legal name, full address, interest in the deposit expressed as a percentage or dollar amount for each trust beneficiary) for their trust account that is designated as a General Trust.

UPLOADING A FILE

Select **Manage My Accounts** located on the top right hand side of the Scotia OnLine landing page.



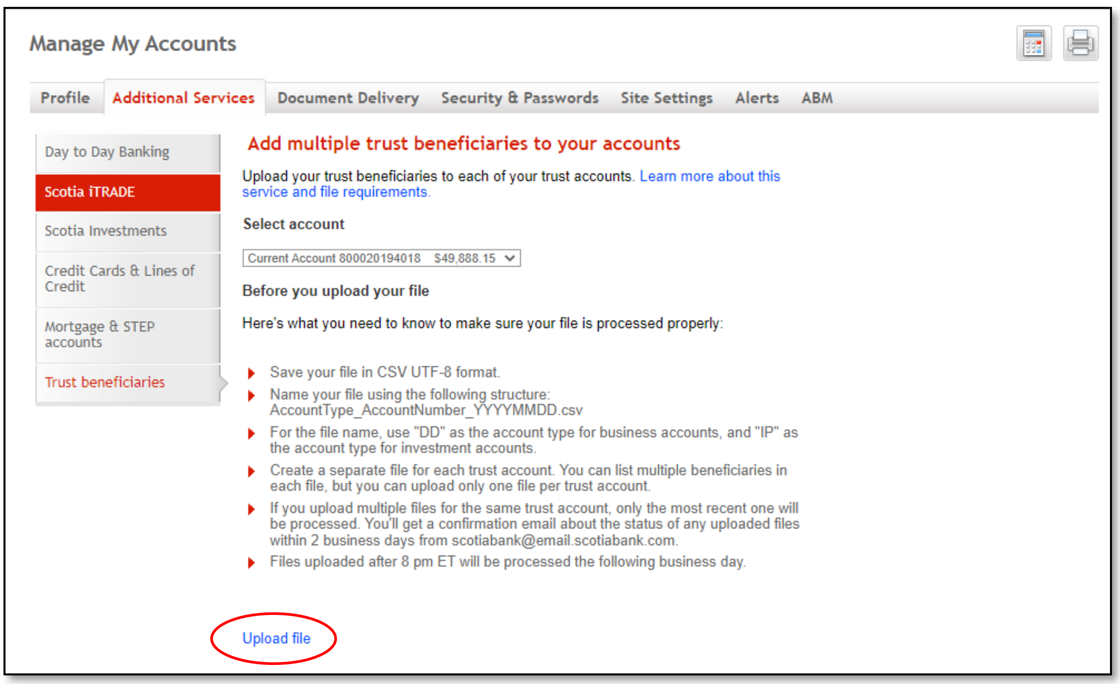
Select **Additional Services** and then **Trust beneficiaries**.



From the **Trust beneficiaries tab**, select the account for which you want to upload your trust beneficiaries from the dropdown menu.

Next, review the *Before you upload your file* information and select the **Upload file**[1] button.

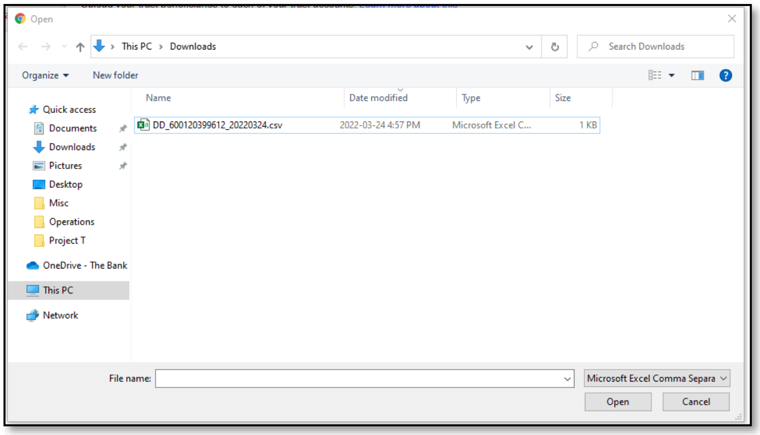
> Note: If you need more information about this service and file specification requirements, select the **Learn more about this service and file requirements** link.



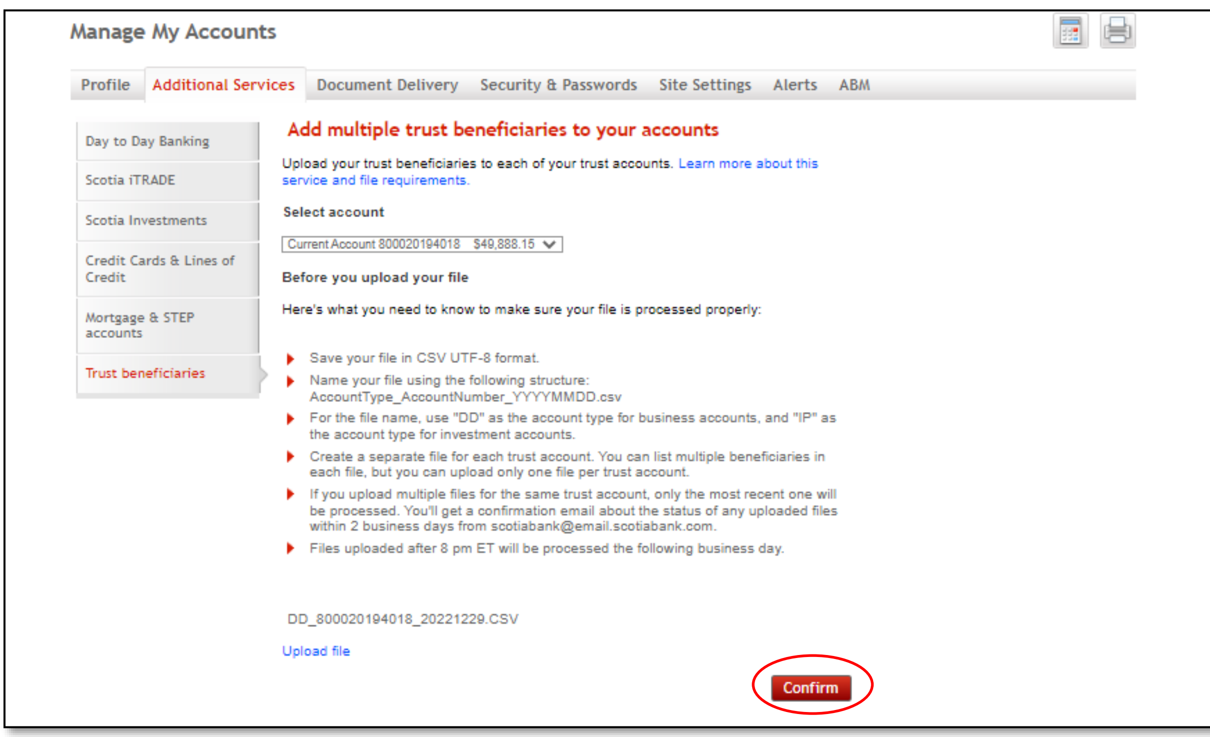
[1] The *Upload file* button may display with a different title (e.g., Browse, Open) depending on the browser or system used.

Select the appropriate CSV UTF-8 file from the window that displays.

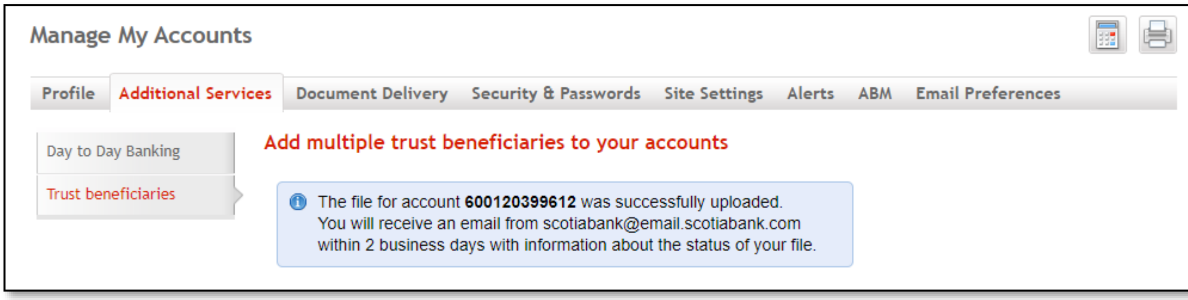
Sample pop up window



Select **Confirm** to upload your file.



A confirmation will appear when a file upload is successful. You can choose to upload another file by selecting the **Trust beneficiaries** tab.



ACCESS TO THE SERVICE

Access to the service is dependent on your card access type. You can go to your profile to check your current setup. The card access types below will enable you to access the **Trust Beneficiaries** tab under **Additional Services**:

- Business One to Sign
- Business Delegate with Financial Entitlement
- Business Multiple to Sign with Financial Entitlement
- Personal + Business

Contact your bank representative if you need to make any changes.

FOR FURTHER ASSISTANCE

Please call the Customer Contact Centre at 1-877 552 5522 – Toll-free number within North America.

Hours of Operations:
Mon-Thurs 9:00am-11:00pm EST
Fri 9:00am-10:00pm EST
Sat 10:00am-6:00pm EST