

**Private  
Investment  
Advice**

# **TeleMax User Guide**

**For Advised Accounts**



**Waterhouse**

## WELCOME TO TELEMAT<sup>®</sup>

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TeleMax is the advanced automated telephone service that lets you monitor the market and review the advised portion of your TD Waterhouse<sup>®</sup> Private Investment Advice portfolio 24 hours a day, seven days a week\*. All with security and privacy provided by your personal TD Waterhouse Private Investment Advice account number and confidential password. For information on how TeleMax can be used with the non-advised portion of your TD Waterhouse Private Investment Advice account, please refer to the "TeleMax User Guide For Non-Advised Accounts". Any reference to "TD Waterhouse Private Investment Advice account" in this document refers to the advised portion only.

## EASY TO USE WITH A TOUCH-TONE PHONE

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You'll find TeleMax easy to use with straightforward verbal instructions. Simply dial the local or toll-free number, listen for the prompts and respond by pressing the touch-tone buttons. And don't forget you can press **0**, **#** at any time to speak to a TD Waterhouse Investment Representative, or the TeleMax Help Desk.

## NEED HELP?

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If your equity, option or mutual fund symbol is not found, please call your local TD Waterhouse Private Investment Advice office to verify. If you are having any other difficulties, call the TeleMax Help Desk at (416) 982-6000 or 1-800-667-6299, available 24 hours a day, seven days a week.

Don't forget we also offer WebBroker<sup>®</sup>, which features on-line access to market quotes, research, TD Waterhouse eServices<sup>®</sup> and account information.

- \* Except during regularly scheduled system maintenance times.
- \*\* Your first 50 quotes each month do not carry forward. The additional free quotes earned for each trade completed accumulate and carry forward until used.

THIS GUIDE SHOWS YOU HOW

To Access TeleMax ..... 2

**1** Quotes ..... 4

**2** Market Monitor ..... 6

**3** Account Inquiry ..... 8

**5** Personal Profile ..... 9

Appendix – Index Symbols ..... 11

Quick Reference Guide ..... Inside Back Cover

Useful Tables ..... Back Flap

TeleMax and Other Important Phone Numbers ..... Back Cover

## TO ACCESS TELEMATX

### CALL USING A TOUCH-TONE PHONE

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Toronto	(416) 593-TMAX (8629)
Montreal	(514) 765-TMAX (8629)
Elsewhere in Canada or U.S.A.	1-800-387-1722 (Toll Free)
Hong Kong	800-962869

### WHEN PROMPTED, ENTER THE FOLLOWING INFORMATION BY PRESSING THE TOUCH-TONE KEYS:

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SELECT **1** FOR ENGLISH OR **2** FOR FRENCH  
ENTER YOUR SIX-DIGIT TD WATERHOUSE ACCOUNT NUMBER,  
FOLLOWED BY **#**

To enter a letter using the keypad, you will need to press two keys. Press the key on which the letter appears and then the number corresponding to the position of the letter on that key. For example, for "G", which appears on the 4 key in position 1, press 4, 1. If your account number is 1G1111, press 1, 41, 1, 1, 1, 1.

Please use the numeric alphabet guide shown on the right as a reference.

ENTER YOUR FOUR-DIGIT TELEMATX PASSWORD FOLLOWED BY **#**

You are now ready to use TeleMax. Use the following commands at any time during your call:

- \*** to return to previous menu
- #** to access Help under any selection, or to skip ahead when listening to quotes, outstanding orders, new issues information or stock baskets
- 0**, **#** to speak to a TD Waterhouse Investment Representative

Now read on for instructions on each of these features.

### WHEN PROMPTED, SELECT FROM THE MAIN MENU

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#### **1** QUOTES

To obtain real-time quotes on Canadian and U.S. equities, options, indices and Canadian mutual funds traded through TD Waterhouse Private Investment Advice.

#### **2** MARKET MONITOR

Review popular indices and market indicators, create customized stock baskets to track your own equities, options and mutual funds available through TD Waterhouse Private Investment Advice.

### **3 ACCOUNT INQUIRY**

To monitor cash and portfolio values on your TD Waterhouse Private Investment Advice accounts, contributions to your TD Waterhouse Private Investment Advice Self-Directed RSPs and payments from your TD Waterhouse Private Investment Advice Self-Directed RIFs.

### **5 PERSONAL PROFILE**

To change your quote format(s) and password(s), and to review your monthly quote usage.

Now read on for easy instructions on how to complete each of these trading inquiries and transactions. For an overview of all TeleMax functions, refer to the chart on the inside back cover.

#### **TO ACCESS EACH LETTER, ENTER TWO NUMBERS**

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First, enter the number of the phone button on which the letter appears. Then press **1**, **2** or **3** to indicate whether the letter is in the first, second or third position on that button. (Note: there are exceptions for the letters Q, R, S, Z, dashes and spaces.)

#### **NUMERIC ALPHABET**

A 21	J 51	T 81
B 22	K 52	U 82
C 23	L 53	V 83
D 31	M 61	W 91
E 32	N 62	X 92
F 33	O 63	Y 93
		Z 99
G 41	P 71	
H 42	Q 77	– 55
I 43	R 72	• 44
	S 73	

The QUOTES feature lets you obtain real-time quotes on Canadian and U.S. equities, options, indices and Canadian mutual funds available through TD Waterhouse.

Once you have accessed Quotes from the main menu:

#### SELECT THE TYPE OF QUOTE AND EXCHANGE

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- 1** CANADIAN EQUITY QUOTES
- 2** U.S. EQUITY QUOTES  
NYSE, NASDAQ, AMEX, Composite
- 3** OPTION QUOTES  
Canadian, U.S. Options
- 4** MUTUAL FUND QUOTES
- 5** INDEX OR QUICK QUOTES  
Indices (see appendix) and Canadian and U.S. Equities

#### ENTER THE EQUITY, OPTION OR MUTUAL FUND SYMBOL, TWO NUMBERS FOR EACH LETTER

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Find the equity symbol in the financial newspapers or contact your TD Waterhouse Investment Advisor. See page 3 for help on entering a letter. Press # to end your entry.

#### TELEMAX WILL READ THE QUOTE

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Remember that for equities, options and indices, you can pre-select the quote format, choosing from Short, Medium, Long or Detailed by using the Personal Profile feature (page 9).

#### EXAMPLE: TO OBTAIN AN EQUITY QUOTE ON INTERNATIONAL BUSINESS MACHINES ON THE NYSE

<b>2</b>	for U.S. Equity Quotes
<b>1</b>	for NYSE
43 22 61 #	for the equity symbol (IBM):
43	because I is on the 4 button, the third letter on that button
22	because B is on the 2 button, the second letter on that button
61	because M is on the 6 button, the first letter on that button
#	to end your entry

**EXAMPLE: TO OBTAIN AN EQUITY QUOTE ON  
TORONTO DOMINION PREFERRED SERIES D**

1 for Canadian Equity quotes  
81 31 44 71 72 44 31 # for the equity symbol (TD.PR.D)  
To obtain quotes on other securities, use Preferred (PR), Right (RT),  
Warrant (WT). Alternatively, you may shorten your quotes by using  
01 to replace PR, 04 for RT, or 03 for WT. For example:  
81 31 01 31  
T D (PR) D

**EXAMPLE: TO OBTAIN AN OPTION QUOTE ON  
S&P 100 INDEX MAY 550 CALL**

3 for Option Quotes  
4 for U.S. Options  
63 32 92 # for the option symbol (OEX)  
0 5 # for the expiry month (May, entered as  
two-character numerical month)  
5 5 0 # for the whole number portion of the  
strike price (550)  
0 # for the decimal portion of the strike price  
(in this case, none)  
1 for Call option (for Put options, enter 2)

**EXAMPLE: TO OBTAIN A MUTUAL FUND QUOTE ON  
TD CANADIAN BOND FUND (TDB 162)**

4 for Mutual Fund Quotes  
81 31 22 # for the fund family TDB  
162 # for the fund code

**EXAMPLE: TO OBTAIN AN INDEX QUOTE ON THE  
S&P/TSX COMPOSITE INDEX**

5 for Quick Quotes  
43 81 73 32 # Symbol ITSE

The MARKET MONITOR feature lets you review popular indices and market indicators, create stock baskets to track your own equities, options and mutual funds, and receive information on new issues available through TD Waterhouse Private Investment Advice.

### SELECT YOUR ACTIVITY

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#### 1 MARKET BASKET

This lets you review a fixed basket of popular market indicators:

S&P/TSX Composite

S&P/TSX Venture

Dow Jones Industrial Average

NASDAQ Composite

S&P 100

S&P 500

Canadian \$ Spot

U.S. Gold Price

West Texas Intermediate Crude

#### 2 STOCK BASKET

This lets you create and review your own customized basket of equities, options, indices and mutual funds. You can maintain up to five separate baskets at one time, with up to 10 equities, options, indices or mutual funds in each. You will be prompted to select:

**1** to review baskets with quotes, enter **1** or **2** or **3** or **4** or **5** to indicate the basket number

**TO CREATE OR EDIT A STOCK BASKET, ENTER:**

**6** to access the Create/Edit function, enter **1** or **2** or **3** or **4** or **5** to indicate the basket number, then select your activity:

**1** to review a basket (without quotes)

**2** to add equities, options, indices or mutual funds to your basket.

When adding equities/options/mutual funds/indices, you may include a number of shares/contracts and cost per share/contract to track your portfolio's value

**3** to remove equities/options/mutual funds or indices from your basket

**4** to delete the entire basket

To save your basket or any changes you have made, press **5** and you will be brought to the Save Changes Menu. To save any changes made to your stock basket, press **1**. To exit without saving the basket changes, press **2**.

The ACCOUNT INQUIRY feature lets you monitor up-to-date cash and portfolio values and outstanding orders in your TD Waterhouse Private Investment Advice trading accounts as well as contributions to your TD Waterhouse Private Investment Advice Self-Directed RSPs and payments from your TD Waterhouse Private Investment Advice Self-Directed RIFs. Once you have accessed Account Inquiry from the main menu:

#### SELECT YOUR ACCOUNT

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Or, if applicable, enter **2** to move to the multiple account access menu where you can enter a valid six-digit sub-account for inquiry

- 1** first account
- 2** second account
- 3** third account
- 4** fourth account
- 5** other

#### SELECT YOUR ACTIVITY

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- 1 REVIEW CASH BALANCE, SECURITIES MARKET VALUE, TOTAL EQUITY OR MARGIN AVAILABLE**  
All information you receive is effective on the last business day.
- 1 REVIEW SDRSP CONTRIBUTIONS**  
All contributions are as of the last business day.
- 2 REVIEW SDRIF PAYMENTS RECEIVED**  
All payments are as of the last business day.

The PERSONAL PROFILE feature lets you change your quote format and password(s), and review your monthly quote usage. Once you have accessed Personal Profile from the main menu:

### SELECT YOUR ACTIVITY

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#### 1 CHANGE YOUR PREFERENCES

This lets you customize the format in which you receive quotes. Historical orders can be activated through this feature so that one-day historical orders will be listed through the current order listing of Account Inquiry. Press:

- 1 to change your quote preference
- 3 to change historical orders preference

For 1, you may select from the following quote formats:

#### EQUITIES

- 1 Short Last Price, Change, Tick
- 2 Medium Last Price, Change, Tick, Volume
- 3 Long Last Price, Change, Tick, Volume, Bid, Ask
- 4 Detailed Last Price, Change, Tick, Volume, Bid, Ask, Bid Lots, Ask Lots

#### OPTIONS

- 1 Short Bid, Ask, Last Price
- 2 Medium Bid, Ask, Last Price, Volume
- 3 Long Bid, Ask, Last Price, Volume, Change
- 4 Detailed Bid, Ask, Last Price, Volume, Change, High, Low

#### 2 CHANGE YOUR PASSWORD(S)

This lets you customize your four-digit password.

It must always be four digits. Press:

- 1 to change logon password
- 2 to change trading password

#### 3 REVIEW USAGE

This lets you review the number of quotes, stock baskets and market baskets you have received in the current or previous month. The total represents the number used for the month. Press:

- 1 to review this month's usage
- 2 to review last month's usage

**CANADIAN INDICES**

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S&P/TSX Composite	ITSE
S&P/TSX Venture Composite	IVSEC
S&P/TSX 60	ISXO
S&P/TSX Canadian Consumer Discretionary	ITTC
S&P/TSX Canadian Consumer Staples	ITTC
S&P/TSX Canadian Div Metals and Mining	ITTMN
S&P/TSX Canadian Energy	ITTEN
S&P/TSX Canadian Financial Services	ITTF
S&P/TSX Canadian Gold	ITGD
S&P/TSX Canadian Health Care	ITHC
S&P/TSX Canadian Industrials	ITIND
S&P/TSX Canadian Information Technology	ITTK
S&P/TSX Canadian Materials	ITMT
S&P/TSX Canadian MidCap	ITXMC
S&P/TSX Canadian Real Estate	ITRE
S&P/TSX Canadian SmallCap	ITXX
S&P/TSX Canadian Telecommunication Services	ITTS
S&P/TSX Canadian Utilities	ITUTI

**U.S. INDICES**

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<b>AMEX</b>		NASDAQ Insurance	IINSR
AMEX Biotechnology	IBTK	NASDAQ NMS Industrials	ININD
AMEX Composite	IXAX	NASDAQ NMS Composite	INCMP
AMEX Computer Hardware	IHOW	NASDAQ	
AMEX Computer Technology	IXCI	Telecommunications	IIXTC
AMEX Financial	IXFI	NASDAQ Transportation	ITRAN
AMEX Gold BUGS	IHUI	<b>NEW YORK</b>	
AMEX Institutional	IXII	NYSE Finance	INF
AMEX International Market	IADR	NYSE Industrial	NDA
AMEX Japan	IJPN	NYSE Transportation	INHZ
AMEX Major Market	IXMI	NYSE Utility	INNA
AMEX Major Market Index Reduced	IXLT	<b>PHLX</b>	
AMEX North American Telecommunications	IIXTC	Philadelphia Gold and Silver	IXAU
AMEX Oil & Gas	IXOI	Philadelphia KBW Banking	IBKX
AMEX Pharmaceutical	IDRG	Philadelphia Oil Service Sector	IOSX
<b>DOW JONES</b>		Philadelphia Semiconductor	ISOX
Dow Jones Corporate Bond	IDJBD	<b>STANDARD &amp; POOR'S</b>	
Dow Jones Composite	IDJIC	Standard & Poor's 100	IOEX
Dow Jones Industrial Average	IDJII	Standard & Poor's 500	ISPX
Dow Jones Transportation Average	IDJIT	Standard & Poor's Financial	ISPIF
Dow Jones Utilities Average	IDJIU	Standard & Poor's Industrial	ISPII
<b>NASDAQ</b>		Standard & Poor's Transportation	ISPII
NASDAQ 100	INDX	Standard & Poor's Utilities	ISPIU
NASDAQ Bank	IBANK	<b>OTHER U.S. INDICES</b>	
NASDAQ Biotech	IXB	CBOE Latin 15	ILTX
NASDAQ Composite	ICOMP	CBOE Market Volatility	IVIX
NASDAQ Computer	IXK	CBOE Mexico	IMEX
NASDAQ Finance	IOFIN	Russell 2000	IRUT
NASDAQ Financial	IIXF	Russell 3000	IRUA
NASDAQ Industrial	IINDS	Wilshire Small Cap	IWSX
		Wilshire 5000	ITMW

**ACCUMULATED VOLUME SYMBOLS**

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American	IVOLA	NASDAQ	IVOLQ
Dow Jones Industrials	IVOLD	TSX	IVOLT
New York	IVOLN	TSX Venture	IVOLV

**INTERNATIONAL MARKET INDICATORS**

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German Dax	IGDAXI	Japan Yen ¥ Spot Rate	
Hong Kong Hang Seng	IHHSI	(US\$ per 10,000)	IFJPY
Japan Nikkei	IINIK	Mexico Peso Exchange Rate	
Singapore Straits Times	ISST	(US\$ per 100)	IFMXP
Canadian Dollar Exchange Rate		Singapore Dollar Exchange Rate	
(C\$ – US\$)	ICAN	(US\$ per 10,000)	IFSPD
Canadian Dollar Exchange Rate		Swedish Krona Exchange Rate	
(US\$ – C\$)	IFCAN	(US\$ per 100)	IFSWK
Australian Dollar Exchange Rate		Swiss Franc Spot Rate	
(US\$ per 100)	IFAUD	(US\$ per 100)	IFSWF
Brazilian Real Exchange Rate		Taiwan Dollar Exchange Rate	
(US\$ per 10,000)	IFBRR	(US\$ per 10,000)	IFTWD
British Sterling £ Spot Rate		Federal Fund Rate	IFEDF
(US\$ per 100)	IFSTG	U.S. Gold Spot	ICGLD
European Monetary Exchange		Silver Spot	ICSIL
Rate (US\$ per 1,000)	IFEUR	West Texas	
Hong Kong Dollar Exchange Rate		Intermediate Crude	ICWTI
(US\$ per 100)	IFHKD	FT Actuaries Europe	IERI
Indian Rupee Exchange Rate		London Gold Fix	IGLDL
(US\$ per 10,000)	IFINR	Zurich Gold	IGLDZ

**ISSUE FLUCTUATIONS**

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<b>NYSE</b>		<b>TSX</b>	
TRIN NYSE	ITRIN	Toronto Issues Advanced	ITYUS
New York advances	INYUS	Toronto Issues Declined	ITYDS
New York declines	INYDS	Toronto Issues Unchanged	ITYUC
New York down volume	INYDV	Toronto Volume	
NYSE unchanged	INYUC	Issues Advanced	ITYUV
New York		Toronto Volume	
volume advances	INYUV	Issues Declined	ITYDV

**TICK INDEX**

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American	ITICA	New York	ITICN
NASDAQ	ITICQ	Toronto	ITICT

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Index symbols may be subject to change at any time. If the index symbol is not found in TeleMax, please contact your local TD Waterhouse office, or visit [www.tdwaterhouse.ca](http://www.tdwaterhouse.ca)

TELEMAX – QUICK REFERENCE GUIDE

Toronto (416) 593-TMAX (8629)  
 Montreal (514) 765-TMAX (8629)  
 Elsewhere in Canada or the U.S.A. 1-800-387-1722  
 Hong Kong 800-962869

WELCOME TO TELEMAX

LANGUAGE PREFERENCE (ENGLISH **1** FRENCH **2**)

ENTER ACCOUNT NUMBER         #

ENTER PASSWORD      #

When prompted, select from the main menu

1	2	3	5
QUOTES	MARKET MONITOR	ACCOUNT INQUIRY	PERSONAL PROFILE
<p><b>1</b> CANADIAN EQUITY QUOTES</p> <ul style="list-style-type: none"> <li>TSX</li> <li>ME</li> <li>TSX VENTURE</li> <li>OTC</li> </ul> <p><b>2</b> U.S. EQUITY QUOTES</p> <ul style="list-style-type: none"> <li>NYSE</li> <li>NASDAQ</li> <li>AMEX</li> <li>Composite</li> </ul> <p><b>3</b> OPTION QUOTES</p> <ul style="list-style-type: none"> <li>ME</li> <li>U.S. Options</li> </ul> <p><b>4</b> MUTUAL FUND QUOTES</p> <p><b>5</b> QUICK QUOTES</p> <ul style="list-style-type: none"> <li>Indices</li> <li>Equities</li> </ul>	<p><b>1</b> MARKET BASKET</p> <ul style="list-style-type: none"> <li>S&amp;P/TSX Composite Index</li> <li>S&amp;P/TSX Venture</li> <li>Dow Jones Industrial Average</li> <li>NASDAQ Composite</li> <li>S&amp;P 100</li> <li>S&amp;P 500</li> <li>Canadian \$ Spot</li> <li>U.S. Gold Price</li> <li>West Texas Intermediate Crude</li> </ul> <p><b>2</b> STOCK BASKET</p> <ul style="list-style-type: none"> <li>Review with quotes</li> <li>Create or edit up to five baskets</li> </ul>	<p>Enter Valid Sub-Account (if applicable)</p> <p><b>1</b> FIRST ACCOUNT</p> <p><b>2</b> SECOND ACCOUNT</p> <p><b>3</b> THIRD ACCOUNT</p> <p><b>4</b> FOURTH ACCOUNT</p> <p><b>5</b> OTHER</p> <ul style="list-style-type: none"> <li>Review outstanding orders, SDRSP contributions, SDRIF payments</li> </ul>	<p><b>1</b> CHANGE PREFERENCES</p> <ul style="list-style-type: none"> <li>Quote Preference</li> <li>Historical Orders</li> <li>On or Off</li> </ul> <p><b>2</b> CHANGE TELEMAX PASSWORD</p> <p>Logon</p> <p><b>3</b> REVIEW USAGE</p> <ul style="list-style-type: none"> <li>This Month's</li> <li>Last Month's</li> </ul>

FOR FAST NAVIGATION, PRESS THE FOLLOWING AT ANY TIME

- 0, #** SPEAK TO A TD WATERHOUSE INVESTMENT REPRESENTATIVE
- \*** PREVIOUS MENU
- #** HELP MESSAGE OR SKIP TO NEXT ENTRY

## USEFUL TABLES

Bid and Ask prices are quoted for board lot multiples of the security. If you will be specifying a Limit price, it is easier to execute your order if the number of shares is in board lot increments. Please refer to this chart.

### MINIMUM QUOTE SPREADS

<b>CANADA</b>	<b>TSX</b>	<b>ME/TSX VENTURE</b>
Less than \$0.50	\$0.005	N/A
\$0.50 - \$4.99	\$0.01	\$0.01
\$5 and above	\$0.05	\$0.05
<b>UNITED STATES</b>	<b>NYSE &amp; AMEX</b>	<b>NASDAQ STOCK MARKET</b>
Less than \$1	\$0.01	Spread
\$1 and above	\$0.01	determined by
Less than \$5	\$0.01	the specialist
\$5 and above	\$0.01	in each security

### MINIMUM QUOTATION SPREAD FOR OPTIONS

The valid price discretion increments for options are listed below:

#### **CANADIAN OPTIONS**

\$0.01 - \$0.09	\$0.01
\$0.10 and over	\$0.05

#### **U.S. OPTIONS**

Price less than \$3	\$0.05
Price greater than \$3	\$0.10

**To call TeleMax:**

**Toronto**

**(416) 593-TMAX (8629)**

**Montreal**

**(514) 765-TMAX (8629)**

**Elsewhere in Canada or the U.S.A.**

**1-800-387-1722**

**Hong Kong**

**800-962869**

**Internet/WebBroker**

**[www.tdwaterhouse.ca](http://www.tdwaterhouse.ca)**

**Other Important**

**TD Waterhouse Numbers:**

**Customer Service**

**1-800-465-5463**

**Electronic Brokerage Services**

**Help Desk 1-800-667-6299**

**Or contact your TD Waterhouse  
Investment Advisor**

This guide is for clients of TD Waterhouse Private Investment Advice, a division of TD Waterhouse Canada Inc., a subsidiary of The Toronto-Dominion Bank. TD Waterhouse – Member CIPF.

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