

Adding External Accounts in Client Access

If the service is enabled by your financial advisor, you can add external account data so that it appears on the Summary screen (Client Access’s home page). Having external account information on the Summary screen, along with your Raymond James accounts, can assist you in attaining a net worth view.

You can add two types of accounts:

- **Accounts at external financial institutions** – The account balances are updated daily using a secure, automated feed.
- **Offline accounts** – The account balances of offline accounts (assets and liabilities not available via online access) must be manually updated.

VIEWING EXTERNAL ACCOUNTS

When you access the My Accounts > Summary screen in Client Access, the default view lists both Raymond James accounts and any external accounts that have been added.

Click the **Raymond James Accounts** link to exclude external accounts that you have added.

The screenshot displays the 'My Accounts | Summary' page in the Raymond James Client Access interface. At the top, there are navigation tabs for 'MY ACCOUNTS', 'ACCOUNT SERVICES', 'VAULT', and 'MARKET RESEARCH'. The 'Summary' tab is active, showing a sub-menu with 'Portfolio', 'Analysis', 'Goals', 'Documents', 'Bill Pay', and 'Funds Transfer'. The main content area is titled 'My Accounts | Summary' and features a 'QUICK LINKS' dropdown menu.

Key financial metrics are displayed:

- ASSETS:** \$3,929,667.92
- LIABILITIES:** \$(676,504.94)
- NET BALANCE:** \$3,253,162.98

Below these metrics, there is a 'SHOW:' section with a filter for 'All Accounts' set to 'Raymond James Accounts' (highlighted with a red box). An 'ADD/EDIT EXTERNAL ACCOUNT' button is visible. The 'Assets: \$2,443,162.86' section lists several accounts:

- Account 1: \$420,321.09
- Account 2: \$49,874.79
- Account 3: \$137,801.27
- Banking: \$3,897.52
- Credit Card: \$(1,882.16)
- Loan: \$(32,099.72)
- Investment: \$628,810.90

A red box labeled 'External accounts' encompasses the Banking, Credit Card, Loan, and Investment entries. To the right, the 'Reports' section shows a line chart for 'Account 1' with 'VALUE OVER TIME' selected. The chart plots 'Market Value' on the y-axis (ranging from \$750K to \$830K) against dates on the x-axis (11/15, 5/16, 11/16, 5/17, 11/17). Two lines are shown: 'Portfolio Value' (green) and 'Amount Invested' (blue).

ADDING EXTERNAL ACCOUNTS – FIRST TIME ACCESS

The first time you use the **Add/Edit External Account** link, a step to acknowledge and accept Terms and Conditions is included. (This step won't appear in subsequent use of the link, unless the Terms and Conditions change.)

To add external accounts for the first time:

1. On the My Accounts > Summary screen, click the **Add/Edit External Account** link.

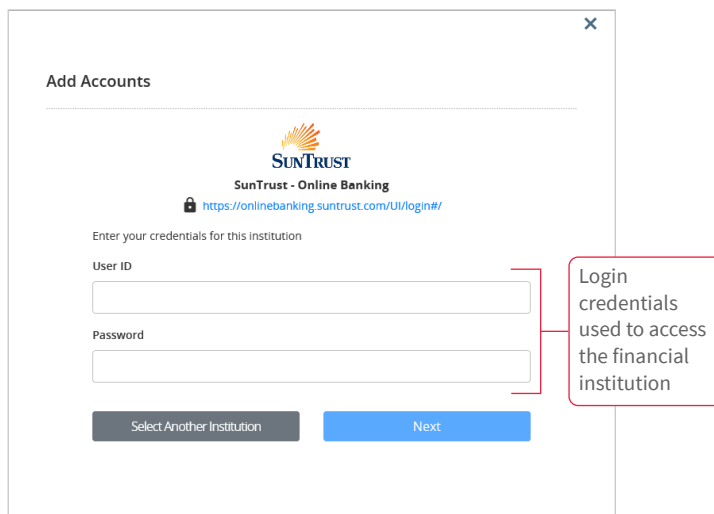
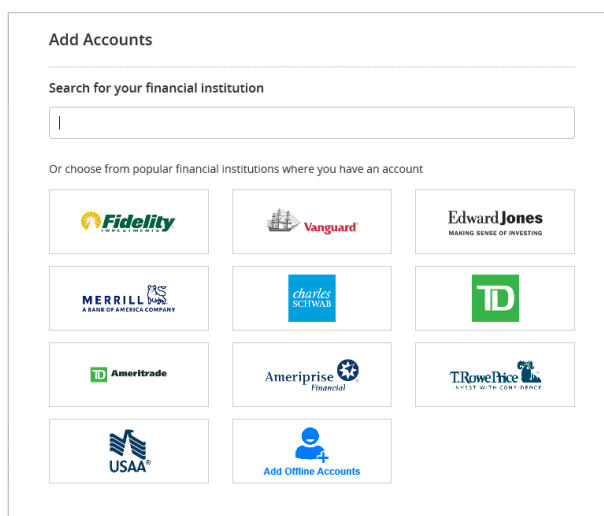
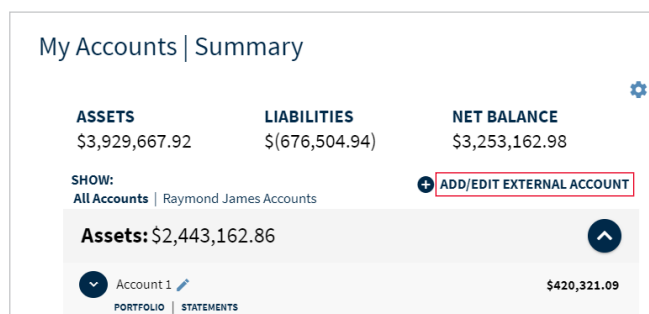
2. To continue, review and accept the Terms and Conditions and click the **Next** button.

Note: If the Terms and Conditions are not accepted, the service cannot be used.

3. Follow the Add Accounts wizard to search for and select a financial institution or an offline account (asset or liability).

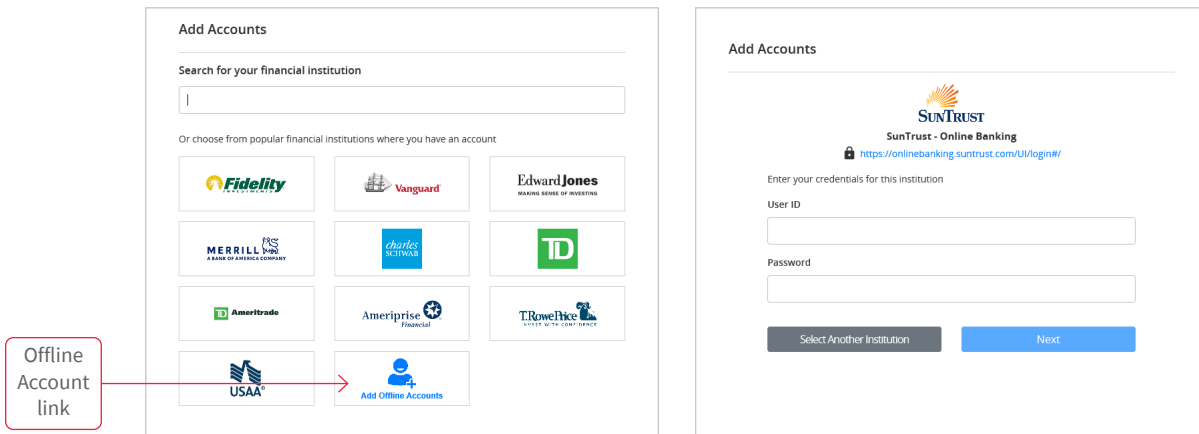
FINANCIAL INSTITUTION

- Follow the wizard to search for an institution (or select from a pre-defined list of popular institutions) and to add related accounts.
- As part of the wizard, enter the login credentials used to access the selected financial institution.
- If you need to add another financial institution to the list, click the **Select Another Institution** button.
- Click the **Next** button to move through the screens.
- The screens to the right illustrate two of the primary screens in the process.



OFFLINE ACCOUNT

- Click the **Offline Account** link at the bottom of the screen to add an asset or liability that is not available via online access, such as real estate.
- When prompted, select the offline account type and enter a name and a value for the offline account.
- Click the **Next** button when done.



Note: After the accounts have been added and the wizard is closed, a slight delay may occur before the accounts appear on the My Accounts > Summary screen. A message in the lower right of the screen indicates the delay. Once processing takes place, the accounts appear in the list on the screen.



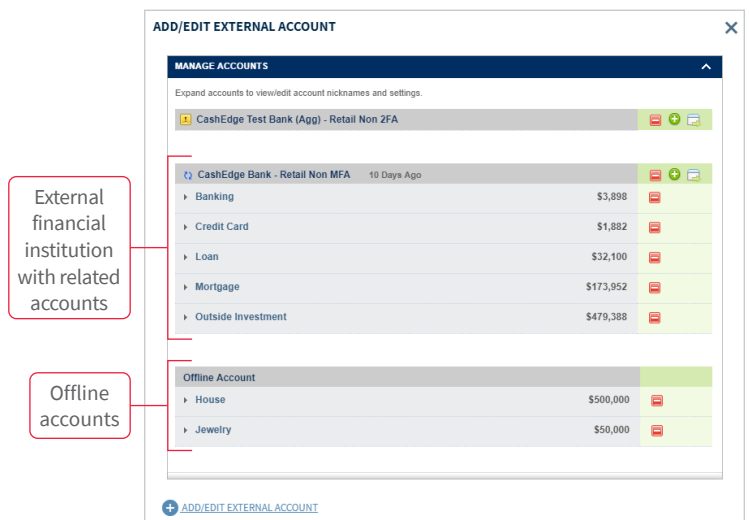
ADDING EXTERNAL ACCOUNTS – AFTER FIRST TIME ACCESS

After the initial addition of external account information, you'll continue to use the **Add/Edit External Account** link, but the screen presentation is somewhat different. For the steps to add external accounts after initial access, see the following section, Managing External Accounts.

MANAGING EXTERNAL ACCOUNTS

After first-time access, take the following steps to add external accounts, or to edit or delete an existing account:

1. On the My Accounts > Summary screen, click the **Add/Edit External Account** link. The Manage Accounts screen opens listing the financial institutions and related accounts, along with any offline accounts, that have been added.

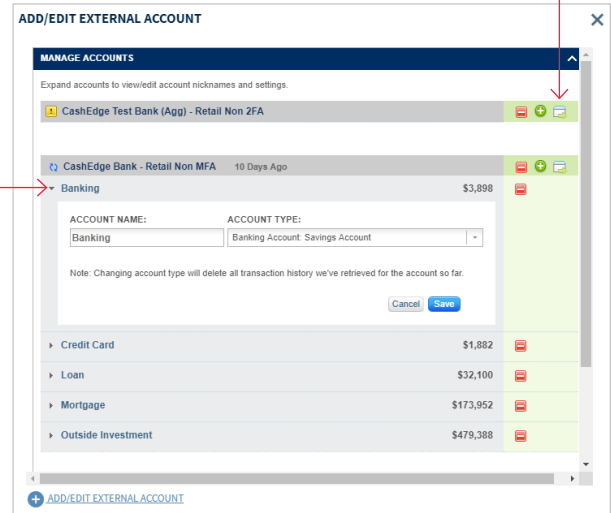


2. On the Manage Accounts screen:

- Add a new financial institution by clicking the **Add/Edit External Account** link at the top or bottom of the screen.
- Add an account by clicking the **plus + sign** to the right of the institution name and following the instructions in the wizard.
- Delete a financial institution or an offline account by clicking the **Delete = icon** for that row.
- Edit an institutional account name or type by clicking the **Arrow ▶ icon** to expand the account information. Make your changes and click the **Save** button.
- Edit an offline account name, type or balance by clicking the **Arrow ▶ icon** to expand the account information. Make your changes and click the **Save** button.

Click this icon to log in to the financial institution.

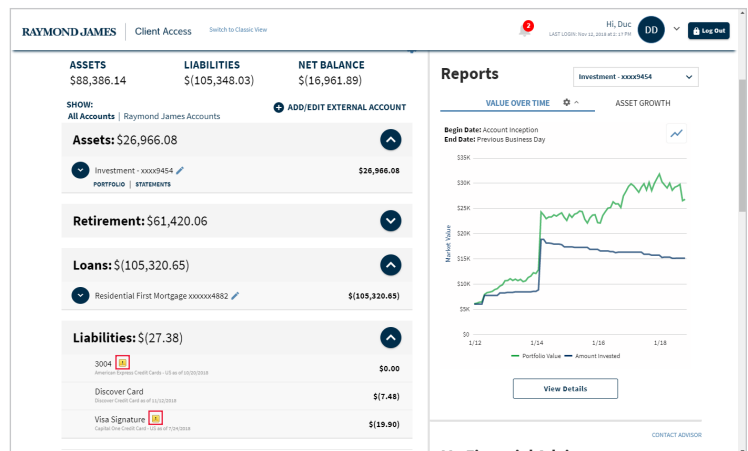
Click the arrow icon to expand the account information for editing.



RESOLVING ALERTS

Alerts related to external accounts typically indicate an issue such as a password that has been updated at an outside institution. (To clear such an alert, the password for the external account that was updated at the outside institution must also be updated in Client Access.)

To resolve an alert, click the yellow **Alert ⚠ icon** shown with the account and follow the instructions on the screen that appears.



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