

Investor (Client) Access 2018 Updates: Frequently Asked Questions

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IN GENERAL

When will the enhancements and rebrand be implemented?

The release is planned for the weekend of October 20, 2018.

Why are you changing the name?

The update from “Investor Access” to “Client Access” better reflects the breadth of services – from goal planning to retirement – your advisor provides. It also aligns with the Raymond James value of client service.

Does that mean there will be a new link?

Yes. The new URL will be <https://www.raymondjames.com/clientaccess>. Although the old links will still work, we recommend you update your bookmark (if you have one) after the release on October 20.

What are the major updates?

Based on feedback from advisors and clients, we have added functionality and updated the design to make finding important information easier – even on the go:

- The site will be fully responsive, so it looks great and functions well on any device.
- Value Over Time and Asset Growth charts have been added to help you see where your portfolio stands over time.
- Total balances – assets, liabilities and net balance – are easier to find and read.
- New grouping and sorting options have been added to the portfolio page, along with highlighted information at the top of the current value tab within portfolio.
- The “Market Information” and “Research & Commentary” tabs have been consolidated into a single “Market Research” tab to make finding information easier.
- We’ve updated the mobile app to reflect the new features and design updates. Now, the app includes all the same functionality as the desktop site, *plus* thumbprint or facial recognition login options and mobile check deposit.

What if I prefer the “classic” Investor Access?

Keep in mind that while some things in Client Access will look different from the “classic” site, we are not changing the primary menu elements (tabs for summary, portfolio, etc.), and in fact much of the navigation will remain the same.

However, recognizing that changes can sometimes be challenging at first, we’ve included a link that enables you to switch to the classic view of the summary and portfolio pages. The intention is to help smooth the transition from the classic look to the updated look. The “switch to classic view” option will be available for approximately six months. Eventually, the classic view will be retired.

LINKS/BOOKMARKS/URLS

If I have the current Investor Access site bookmarked, will I have to update my bookmark?

The existing Investor Access URL will be redirected to the new Client Access URL (<https://www.raymondjames.com/clientaccess>). Because of this, you will still be able to reach the site and log in using your existing bookmark after the release.

However, while old bookmarks will still work due to the redirect, we recommend you update your bookmarks after the release to ensure it points to the new URL, which will be <https://www.raymondjames.com/clientaccess>. This will help ensure you continue to reach the site easily in the event the redirect from the old URL is retired in the future.

If I use the “remember me” function to save my username and password, will that carry over when the site is updated?

Because the URL of the site is changing, you will need to re-select the “remember me” feature. If you choose to use the “remember me” feature, you will only need to enter your credentials and select “remember me” once after the update.

SUMMARY PAGE

On the Summary page, the reports show only one account at a time. Can I see multiple accounts together?

You can view multiple (or all) accounts in the charts by visiting the Analysis tab. We do plan to offer the ability to view multiple accounts on the Summary page reports in the future.

Where do the amounts listed as liabilities come from?

Raymond James Bank mortgages, securities based loans, and liabilities from outside accounts linked through account aggregation are counted in the liabilities number.

Where is available cash, change since last statement, etc.?

To view available cash, change since last statement, and other information previously included in the classic summary grid, click the arrow to expand the account details.

PORTFOLIO

What is changing on the portfolio page?

We have added the ability to sort and group in new ways, including by product type or account. A new section at the top of the page prominently displays current value, daily change and investment or cost basis gain/loss. You can also edit and reorder the columns in the portfolio details to personalize the page. These changes will be saved by the system until you decide to change them again.

Where did unrealized gain/loss go?

Unrealized gain and loss are now available as columns on the current value tab. This makes finding gain/loss information easier and reduces the number of clicks as you navigate the site.

ANALYSIS TAB

When is data updated on the value over time and asset growth charts?

The value over time and asset growth charts display data from the previous day’s close.

Will additional reports be added in the future?

Yes, we expect to offer additional reports in Client Access in the future.

MARKET RESEARCH TAB

What are the major updates?

In this release, we consolidated two tabs – “Market Information” and “Research and Commentary” – into one tab, now called “Market Research.” Consolidating this information into a single tab should help save you time and streamline your research experience. For example, now when you search for a quote on a company covered by Raymond James Equity Research, a “research” tab containing that additional information will automatically appear right in the context of the search.

MOBILE APP

What's new in the mobile app?

With this release, the mobile app will have all the functionality of the main site, plus thumbprint or face recognition login options and mobile check deposit. You will notice some other design changes – for example, a revised order to items in the main menu – to account for the new functionality and bring the app and full sites more in line with each other. The app icon will also be updated to reflect the new Client Access name.

PERSONALIZATION

Beyond account groupings, can I customize the summary page based on my preferences? If so, how?

You can determine the order in which you want the groups to display, and whether the groups are expanded or collapsed by default. You can also edit the columns on the Portfolio tab.