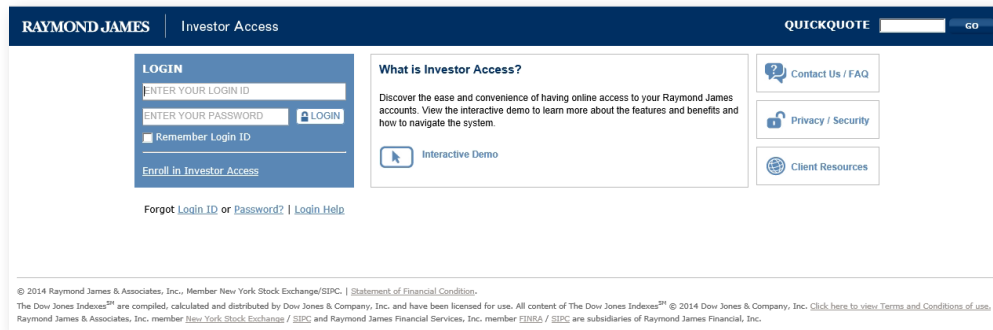


# ENROLLING IN INVESTOR ACCESS

## QUICK REFERENCE GUIDE



Enrolling in Investor Access, Raymond James' convenient and secure way to access your accounts online, is easy! The free, secure, online portal was designed to help you get the most out of your Raymond James accounts, bringing your day-to-day finances and long-term investments together in one place. But it does something even more important – it gives you the control you need to effectively monitor your assets from any computer or select mobile devices. Before you get started, you will need a recent Raymond James account statement – you'll need your brokerage account number (shown on the statement) to enroll.

**Let's get started:**

- Visit your financial advisor's website and click the Account Login link in the upper right corner of the screen. Or, go to [raymondjames.com/investoraccess](http://raymondjames.com/investoraccess).
- Click the link that says Enroll in Investor Access

*If you received an enrollment email from Raymond James saying that your financial advisor has already started your enrollment, click the link in the email to complete enrollment. You will be able to review the information entered by your advisor and make any needed changes.*

**1. PERSONAL INFORMATION**

- 1a** Enter your personal information and your account number in the corresponding fields.  
**NOTE:** If you do not have a Social Security number or used a different form of identification to open your account, select the ID type you used by using the Document Type drop down.
- 1b** Create a login ID, and confirm your new login ID .
- 1c** Read the Terms and Conditions, and select the check box .

**Click the Next button.**

## Enrollment for Investor Access

1 Personal Information

2 Password &amp; Security

3 Notifications &amp; Delivery

To complete the enrollment process, follow the 2 steps below and click the **NEXT** button.

## 2a CREATE PASSWORD

The password strength meter helps you determine if your password is secure enough.

New Password:



- Must include at least 7 characters not to exceed 32 characters
- Include a number or a special character (! @ # \$ % ^ & \* ( ) \_ + - = / \ { } [ ] < > ?)

Confirm New Password:

For a stronger password, use more than 8 characters, and include special characters. For example D@nny\_BOy!

## 2b SELECT SECURITY QUESTIONS

Select your security questions from the drop down boxes below and type your answers in the corresponding fields.

Question 1

Select a Question



Answer 1

**Note:** Do not include special characters in your answer.

Question 2

Select a Question



Answer 2

Question 3

Select a Question



Answer 3

Click the **NEXT** button.

NEXT

CANCEL

## CLIENT SUPPORT

If you have questions or are having difficulties accessing your account information, please view our [FAQs](#) Page.

Call Raymond James Investor Access support at 877-RJ-ACCESS (877-752-2237)

## Hours

*For technical support:*

Monday through Friday: 8 a.m. to 9 p.m. ET

Saturday and Sunday: 8 a.m. to 5 p.m. ET

*For client service, comments and suggestions:*

Monday through Friday: 8 a.m. to 7 n.m. ET

## 2. PASSWORD AND SECURITY

2a Create a password, and confirm your new password.

2b Select three of the security questions and enter the answers in the corresponding fields.

Click the **Next** button.

## Enrollment for Investor Access

1 Personal Information

2 Password &amp; Security

3 Notifications &amp; Delivery

To complete the enrollment process, follow the directions below and click the **FINISH** button.

## A EMAIL NOTIFICATIONS

## Account Notification Email Address

## Document Delivery Email Address

 Same as Account Notification Email Address

## Account Notification Email Address:

Email notifications regarding security, passwords, and login IDs will be sent to this email address.

## Document Delivery Email Address:

Email notifications regarding the availability of a client's online documents will be sent to this email address.

## B SELECT DOCUMENT DELIVERY OPTIONS

Reduce the number of documents you receive by mail or simply manage your delivery preferences. You may update these document delivery selections at any time. You may also change your account name display to more easily identify your accounts.

- I want to receive all my account documents online only.  
 I want to specify which account documents to receive by mail.

To select the documents you want to receive by mail, uncheck "Online viewing only" in the Document Delivery column for the account you want to change. Select your preferences from the options provided.

| Account Name                                     | Account Number | Document Delivery                                       |
|--|----------------|---|
| <input type="text" value="My Account xxxx6617"/> | xxxx6617       | <input checked="" type="checkbox"/> Online viewing only |

Click the **FINISH** button



## 3. NOTIFICATIONS AND DELIVERY

- 3a** Enter your Account Notification and Document Delivery email addresses in the appropriate fields.
- 3b** Select your preferred delivery method for your account documents. You are defaulted to viewing your account documents online only. To specify which documents you would like sent to your address of record, select **I want to specify which account documents to receive by mail** and choose your preferences.

*If you have questions,  
contact your financial advisor or  
Raymond James Investor Access  
Support at 877.752.2237 or  
investoraccess@raymondjames.com  
from 8 a.m. to 6 p.m. ET,  
Monday through Friday.*

Click the **FINISH** button. Investor Access opens and displays your account information.

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER  
880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // TOLL-FREE: 800.248.8863 // RAYMONDJAMES.COM