

ACCOUNT AGGREGATION THROUGH RAYMOND JAMES INVESTOR ACCESS

Your financial world in one place

Now you can have a complete view of your financial world. The Raymond James Investor Access site allows you to connect to and view all of your financial accounts in one place. You can aggregate account information from more than 8,900 financial institutions and have them automatically updated every night.

In addition to your Raymond James accounts, you will see your bank and credit union checking and savings accounts, 401(k) accounts, credit cards, mortgages, and more. You can even manually enter assets such as jewelry, collectibles, cars and real estate to build the full picture of your total net worth.

Talk to your advisor today to start taking advantage of the free account aggregation service available through Investor Access.

ADDING EXTERNAL ACCOUNTS INTO INVESTOR ACCESS

To add external accounts for the first time:

1. On your homepage **Summary** screen, click the **Add or Edit a Non-Raymond James Account** link.

Account Name	Change Since Last Statement	Prior Statement	Prior Year End	Available Cash	Available Margin	Balance
Ruth Capital Access.T00.xxxx0000	(1.58 %)	\$969,375.75	\$923,543.39	\$2,808.06	\$611,410.00	\$953,063.00

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 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.

continued on opposite side

The screens below illustrate two of the primary screens in the process.

Add Accounts

Search for your financial institution:

Examples: Vanguard, TD Ameritrade, or Scottrade

Select the institution where your account is located:

Popular Institutions

- Fidelity Investments - Individual Account- USA
- Vanguard
- Edward Jones - U.S. Clients Access
- Merrill Lynch
- Charles Schwab US - Investment Services
- TD Ameritrade
- Scottrade
- Ameriprise Financial - My Financial Accounts
- T. Rowe Price
- USAA

If your financial institution is not listed here, use the search box above to find it.

Note: Institutions that begin with (i) are not currently available.

Next

If you have an asset or liability that does not have online access (real estate, auto, jewelry, etc.), click here to add an offline account.

Add Accounts

Enter your credentials for the selected financial institution below:

SunTrust - Personal Banking
<https://www.suntrust.com/PersonalBanking>

User ID
jdoe123

Password

Re-enter Password

Select Another Institution

Next

Once you have added all of your accounts, the system will update and you can see your accounts' values right on the Investor Access home page. These values will update each night going forward with the latest information.

SECURITY AT EVERY STEP

Supported by technology built to the highest standard of information security, the account aggregation service offers users multiple layers of protection at every step. Data is aggregated using three highly secure methods to ensure all sensitive information remains private and protected.

Everything is continuously monitored by security experts – 24 hours a day, 7 days a week – and numerous security checks have been built into the application to guard against intrusion attempts. The system also leverages multilevel, state-of-the-art hardware and software, which means data is always encrypted and stored securely.

By ensuring that security and privacy are the foundation of the account aggregation application, we've made it safer to make your financial life a little easier. By aggregating your financial data – across accounts and companies – you and your advisor can build a clearer picture of what you're working with and everything you can accomplish.

RAYMOND JAMES®