

## ENROLLING IN CLIENT ACCESS QUICK REFERENCE GUIDE

Client Access is your source for simple, secure access to your Raymond James account information on your computer or mobile device – it puts instant insight and control at your fingertips. To set up your free account, follow these simple steps.

### 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/clientaccess](http://raymondjames.com/clientaccess).
- Click the link that says **Enroll in Client 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.

### STEP 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** Read the Terms and Conditions, and select the check box.

Click the **Next** button.

## STEP 2 – PASSWORD AND SECURITY

- 2a Create a username, and confirm your new username.
- 2b Create a password, and confirm your new password.
- 2c Select three of the security questions, and enter the answers in the corresponding fields.

Click the **Next** button. You will then be prompted to authenticate the phone number we have on file for you.

**Enrollment for Client Access**

To complete the enrollment process, follow the 3 steps below and click the **NEXT** button. You will then be prompted to verify your phone number and choose whether to receive your enhanced authentication code via text or voice message.

Personal Information Password & Security Notifications & Delivery

**2A. CREATE USERNAME**

New Username:

Confirm New Username:

**2B. CREATE PASSWORD**

New Password:

Confirm New Password:

**2C. SELECT SECURITY QUESTIONS**

Question 1:  Answer 1:

Question 2:  Answer 2:

Question 3:  Answer 3:

Click the **NEXT** button.

## STEP 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.

Click the **Finish** button. Client Access opens and displays your account information.

**Enrollment for Client Access**

To complete the enrollment process, follow the 3 steps below and click the **FINISH** button.

Personal Information Password & Security Notifications & Delivery

**3A. EMAIL NOTIFICATIONS**

Account Notification Email Address:

Document Delivery Email Address:

**3B. SELECT DOCUMENT DELIVERY OPTIONS**

Investment Account Name	Investment Account Number	Delivery Options
	XXXXXX16	<input checked="" type="checkbox"/> Online Viewing Only
	XXXXXX16	<input checked="" type="checkbox"/> Online Viewing Only
	XXXXXX16	<input checked="" type="checkbox"/> Online Viewing Only
	XXXXXX16	<input checked="" type="checkbox"/> Online Viewing Only

Click the **FINISH** button.

If you have questions, contact your financial advisor or Raymond James Client Access Support at 877.752.2237 or [clientaccesssupport@raymondjames.com](mailto:clientaccesssupport@raymondjames.com) from 8 a.m. to 9 p.m. ET Monday through Friday, 8 a.m. to 5 p.m. ET Saturday and Sunday.

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

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