## **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.

RAYMOND JA	MES Client Access			
	A	ccount Login		
	ENTER YOUR LOGIN ID	ENTER YOUR PASSWORD	LOGIN	
		Remember Login ID		
	Forgot L	Login ID or Password?   Login Help		
		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.

### 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.
- Click the link that says **Enroll in Client Access.**

#### **STEP 1** – PERSONAL INFORMATION

- 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.
- **1** Create a login ID, and confirm your new login ID.
- Read the Terms and Conditions, and select the check box.

Click the **Next** button.

ŝ		3:	14 PM	32 % 🖅
	•			
	10- PROVIDE PERSONAL I	NFORMATION		-
	First indiane	Identification / Governmen	tip	
	Last Name	Document Type Social Security Number (SSN)	<ul> <li>Additionally, it helps up solver social security number to verify your identity and ensure you have access to the correct accounts.</li> <li>Additionally, it helps up protect you against unauthorized access a viewing by other sources.</li> </ul>	nd
		Social Security Number	If you used a different ID type to open your account, such as a Taxpayer Identification or Passport number, select from the Docum Tune drondware	sent
	MM/DD/YYYY		NOTE: You must use the same form of identification you used when opened your investment account. If you do not know which identificat you used, contart wore financial advisor or Client Accoss wenow.	you Jian
	Account Notification Em	all Address		
	Email notifications regard	ing security, passwords, and login IDs w	ill be sent to this email address.	
	Brokerage Account Num	ber		the second se
	Eg: 12343678 Excluding Raymond James	Trust or Raymond James Bank account no	umbers.	
				100 March 100 Ma
	D- CREATE LOGIN ID -			and the second se
	New Login ID	Login ID Criteria Login IDs must be between 6 and	132 characters.	1000
	Confirm New Login ID	Letters, numbers, and any of the Cannot contain punctuation, such	following special characters are acceptable: $  \oplus a \leq h, "_{-} > a$ as apostrophes and accent marks.	and the second
	C- AGREE TO TERMS &	CONDITIONS		_
	🔲 I have read and ag	ee to the <u>Client Access Terms and Cond</u>	Rions.	
	Click the NEXT button.		NEXT CA	NCEL
		~		

# **RAYMOND JAMES**

#### **STEP 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. You will then be prompted to authenticate the phone number we have on file for you.

Consolinear for Client Access Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and click the NEXT bottom Consolinear process, follow the 2 stags below and types your answers in the corresponding fields.  Consolinear process below and types your answers in the corresponding fields.  Consolinear process below and types your answers in the corresponding fields.  Consolinear process below and types your answers in the corresponding fields.  Consolinear process below and types your answers in the corresponding fields.  Consolinear process below and types your answers in the corresponding fields.  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Answers 2  Consolinear process below and types your answers in the corresponding fields.  Consolinear process		Client Access		QUICKQUUTE
Compare the evolution for the second se	Enro	Ilment for Client Access	Demonal Information	Descend & County (a) Multifications & Daliumy
CREATE PASSWORD  The password:  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters not to exceed 32 characters  Provide at least 7 characters  Provide at leas		alata tha annallanat annan fallan tha 2		3 Montabolis & Dentery
	TO COM	piece die enrollment process, follow die 2	steps below and cick the NEXT button.	
The password strength meter helps you determine if your password is secure encough.	2a-	CREATE PASSWORD		
Move Password:	· ,	The password strength meter helps you de	etermine if your password is secure enough.	
	N	lew Password:	Must include at least 7 characters	not to exceed 32 characters
Centime New Resources:     For a stronger password, use more than 8 characters, and includes special characters. For example D@mov_BDy(     SELECT SECURITY OUESTIONS     Select of Question      Select a Question     Question 2     Question 3     Question 2     Question 3     Question 3     Question 3     Question 4			<ul> <li>Include a number or a special char</li> </ul>	racter (I @ # \$ % ^ & = ( ) _ + - = / \ { } [ ]
Certifiem New Password  For a stronger password, use more than 8 characters, and include special characters. For example D@ony_BDy(  Select your security cuestions from the drop down boxes below and type your answers in the corresponding fields.  Oversion 1  Constitution  Constitu				
SELECT SECURITY OUESTIONS Select a question from the dop down bases below and type your answers in the corresponding fields.     Answer 1     Answer 2     Genetica 4     Answer 3     Genetica 4     Answer 3			< > ?)	
Select Security outstones     Select a Question from the dop down boxes below and type your answers in the corresponding fields.     Answer 1     Answer 2     Select a Question     Answer 2     Select a Question     Answer 3     Select a Question     Select a Question     Answer 3	c	Confirm New Password: For a stror	< > ?) nger password, use more than 8 characters, and include	special characters. For example D@nny_BOyl
Select 2 Sectority outsides from the drop down boxes below and type your answers in the corresponding fields.     Answer 1 Select 2 Constitution     Select 2 Constitutio	c	Confirm New Password: For a strong	< > ?) nger password, use more than 8 characters, and include	special characters. For example D@nny_BOyl
search your security questions men the ange down backs below along tops your anteresting the corresponding tests.  Note: Do not include special Characters in your anterest  Answer 3  Select a Question  Question 4  Answer 3  Select a Question  Question 4  Answer 3  Select a Question  Answer 3  Select a Que	6	Confirm New Password: For a strong	< > ?) nger password, use more than 8 characters, and include	special characters. For example D@nny_BOyl
Version 7 and 2 an	20-	Confirm New Password: For a stroot	< > ?) nger password, use more than 8 characters, and include	special characters. For example D@nny_BOyl
Question 2 Answer 2 Select a Question Question Answer 3 Select a Question	20-	Confirm New Password: For a stroo SELECT SECURITY QUESTIONS Select your security questions from the dro	< > ?) nger password, use more than 8 characters, and include op down boxes below and type your answers in the corr	special characters. For example D@nny_80yi
Select a Question	20-	Confirm New Password: For a stror SELECT SECURITY QUESTIONS Select your security questions from the dro Question 1 Select 2 Outstion	<> 7) nger password, use more than 8 characters, and include op down boxes below and type your answers in the corr Answer 1	special characters. For example D@ney_BOyl esponding fields. Note: Do not include special characters in your answer.
Question 3 Answer 3 Select a Question v	20-	Confirm New Password: For a stroot SELECT SECURITY QUESTIONS Select your security questions from the dro Question 1 Select a Question	< > 7) nger password, use more than 8 characters, and include op down boxes below and type your answers in the corr op down boxes below and type your answers in the corr Answer 1	special characters. For example D@nny_BOyi esponding fields. Note: Do not include special characters in your answer.
Select a Question	20-	Select or settion Select a Question 2 Select a Question 2 Select a Question 1 Select a Select	c > 7)       oper password, use more than 8 characters, and include       op down bases below and type your answers in the corr       v       Answer 1       Answer 2	spedal characters. For example D@nmy_BOyl esponding fields. Note: Do not include special characters in your assest:
	<b>2</b> 0-	Confirm New Password: For a stroot SELECT SECURITY QUESTIONS Balect your security questions from the dro Question 1 Select a Question Select a Question Concertion 3	<pre>&lt; &gt; 7) op down boxes below and type your answers in the corr op down boxes below and type your answers in the corr Answer 1 Answer 2 Answer 3</pre>	special characters. For example D@rny_B0yl esponding fields. Note: Do not include special characters in your answer:
Select a Question v	20-	For a strop SELECT SECURITY QUESTIONS Select your security questions from the dro Question 1 Select a Question Question 2	c > 7) op down boxes below and type your answers in the correspondence of the second secon	spadal characters. For example D@nny_BOyl exponding Belds. Note: Do not include special characters in your answer.

## **STEP 3** – NOTIFICATIONS AND DELIVERY

- Enter your Account Notification and Document Delivery email addresses in the appropriate fields.
- 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.

Here are some <u>Frequently Asked Questions</u> to guide you through your enrollment. Click <u>Here</u> to get started. Here is a <u>Demo</u> to familiarize yourself with the Client Access system.

	Client Access	Russell 2000 765.61	7.59 11/15/2012 12:56	<b>ΟΝΙCKONOLE</b>
Enrollment for Clie	ent Access		ersonal Information	Password & Security Notifications & Deliver
To complete the enrollment p	process, follow the direct	ions below and click the	FINISH button.	3
A- EMAIL NOTIFIC	ATIONS			
Account Notification notifications@raymon	<b>Email Address</b> djames.com		Account Notifica Email notifications this email address	ion Email Address: regarding security, passwords, and login IDs will be sent to
Document Delivery documents@raymond	Email Address james.com		Document Delive	ry Email Address: regarding the availability of a client's online documents will
Same as Account I	Notification Email Addre	ss	be sent to this ema	il address.
B- SELECT DOCUM	MENT DELIVERY	OPTIONS		
	men account accument.	s to receive by mail.		
o select the documents you ccount you want to change.	want to receive by mail Select your preferences	, uncheck "Online viewi from the options provi	ng only" in the Docum ded.	ent Delivery column for the
To select the documents you account you want to change. Account Name My Account xxxx111	want to receive by mail Select your preference: Account Number x000.1111	I, uncheck "Online viewi from the options provi Document Delivery	ng only" in the Docum ded.	ent Delivery column for the

If you have questions, contact your financial advisor or Raymond James Client Access Support at **877.752.2237** or 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 880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 727.567.1000 RAYMONDJAMES.COM