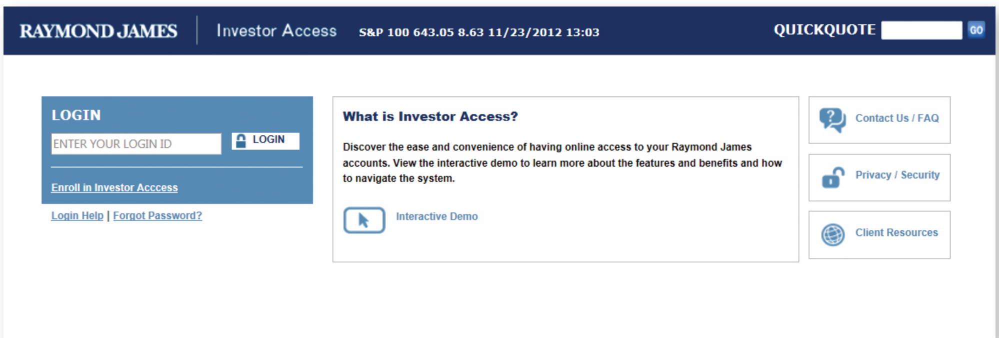
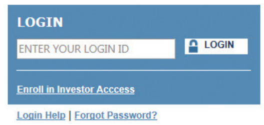
# ENROLLING IN INVESTOR ACCESS

## QUICK REFERENCE GUIDE



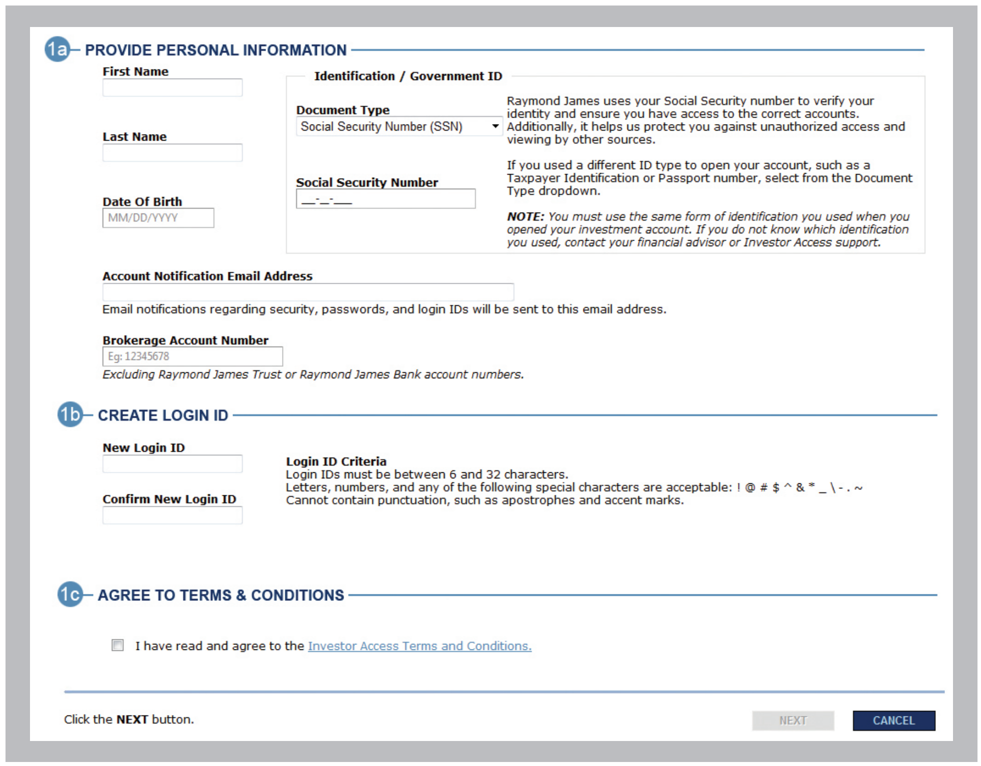

Enrolling in Investor Access, Raymond James' convenient and secure way to access your accounts online, is easy! The free, secure, online portal was designed to help you get the most out of your Raymond James accounts, bringing your day-to-day finances and long-term investments together in one place. 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.
- 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.*



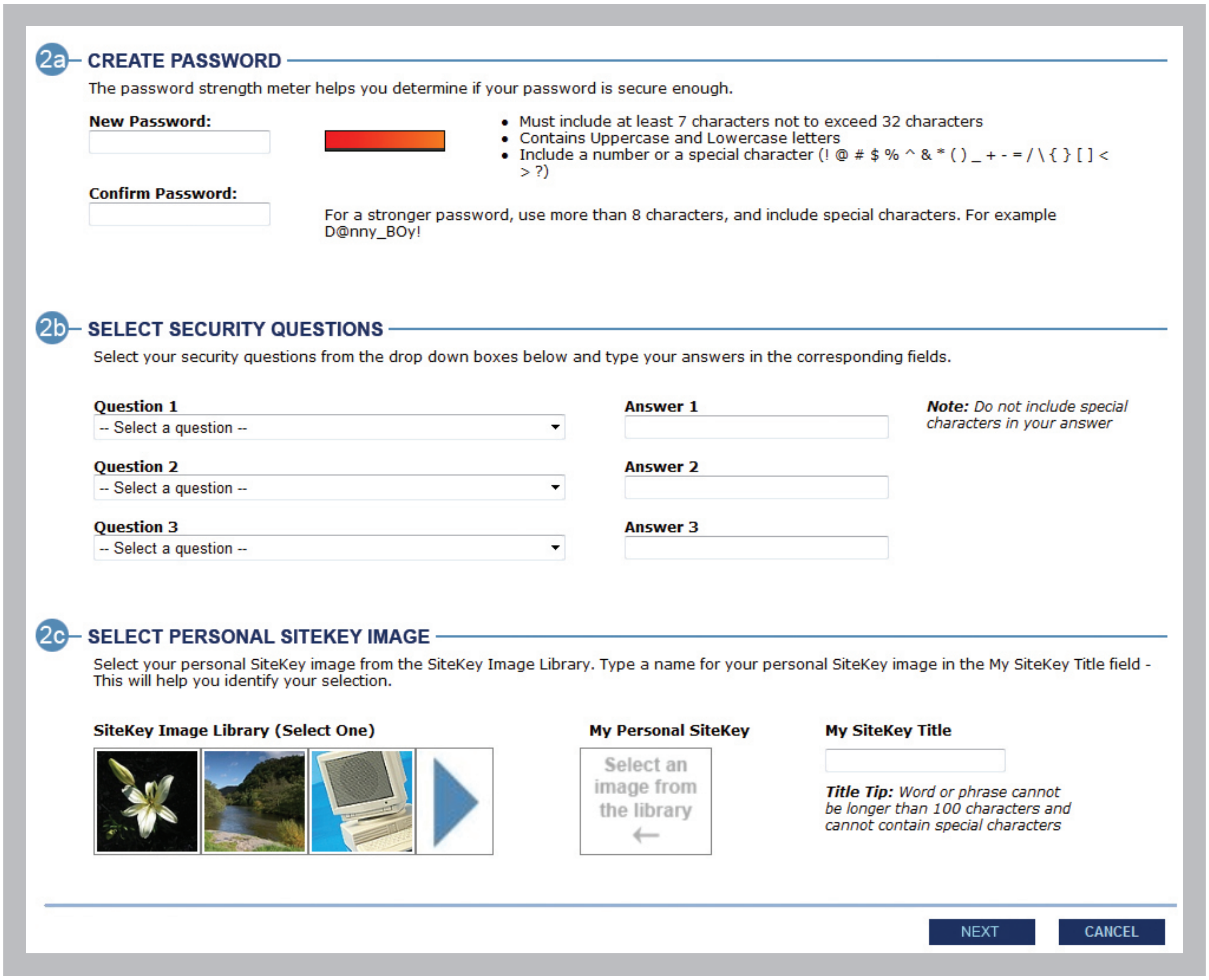

## 1. PERSONAL INFORMATION

**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.**



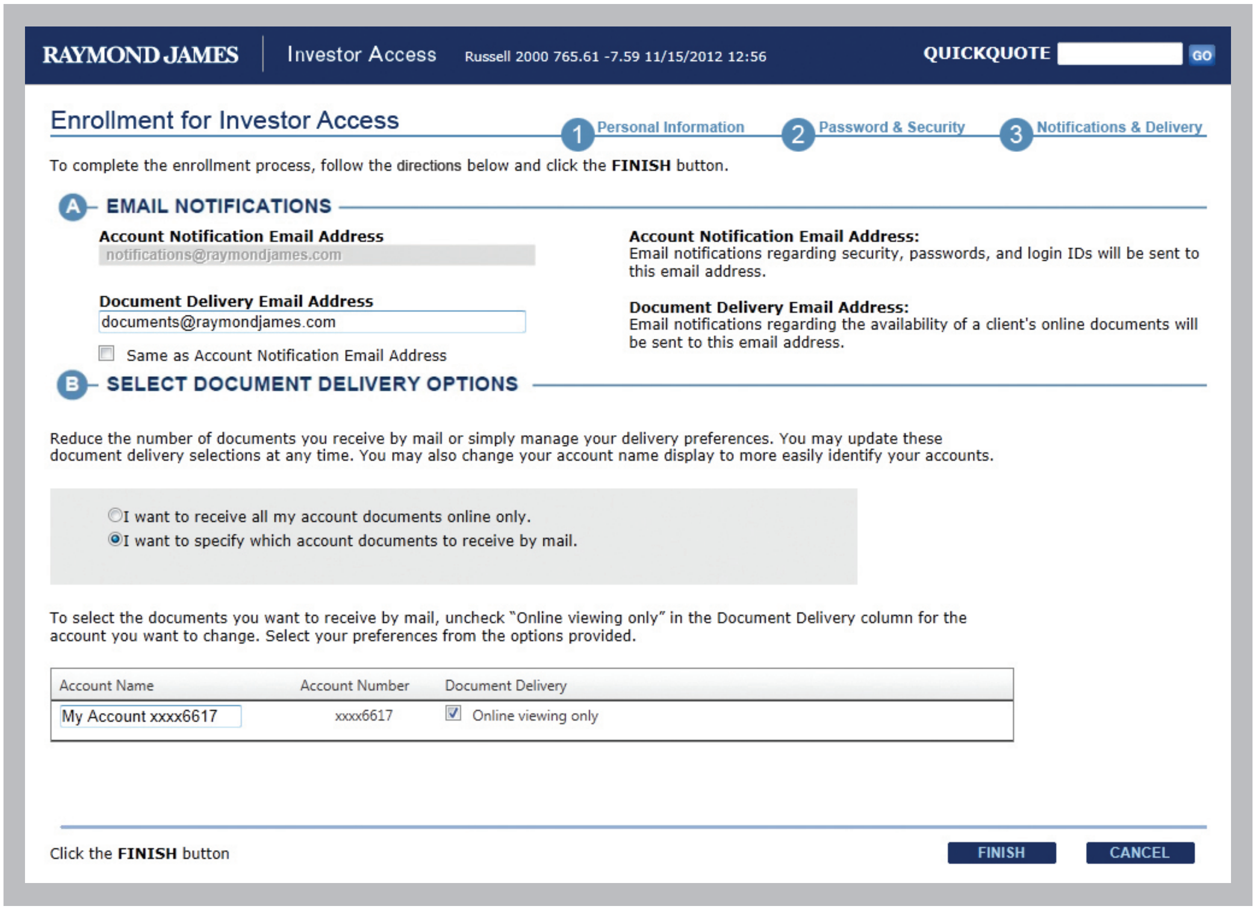

## 2. PASSWORD AND SECURITY

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

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

**2c** Select an image from the SiteKey Image Library and enter a title in the My SiteKey Title field (the title can be no more than 100 characters and cannot include special characters).

**Click the Next 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.

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

*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.*