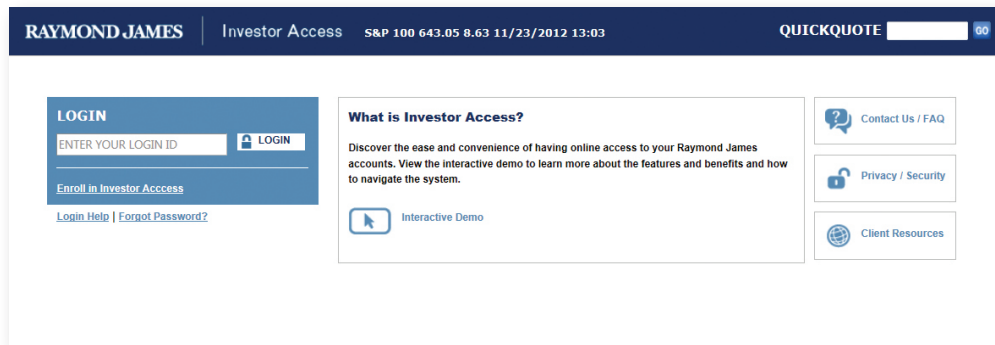


ENROLLING IN INVESTOR ACCESS

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.

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
- Contains Uppercase and Lowercase letters
- Include a number or a special character (! @ # \$ % ^ & * () _ + - = / \ { } [] < > ?)

Confirm 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

Answer 1

Note: Do not include special characters in your answer

Question 2

Answer 2

Question 3

Answer 3

2c— SELECT PERSONAL SITEKEY IMAGE

Select your personal SiteKey image from the SiteKey Image Library. Type a name for your personal SiteKey image in the My SiteKey Title field - This will help you identify your selection.

SiteKey Image Library (Select One)



My Personal SiteKey



My SiteKey Title

Title Tip: Word or phrase cannot be longer than 100 characters and cannot contain special characters

NEXT

CANCEL

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.

Enrollment for Investor Access

1 Personal Information

2 Password & Security

3 Notifications & 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