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						
Account Login							
	ENTER YOUR LOGIN ID	ENTER YOUR PASSWORD	LOGIN				
		Remember Login ID					
Forget Login ID or Password? Login Help							
Emotin 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.

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- PROVIDE PERSONAL I	NFORMATION		
First Name	Identification / Government	tID	
Last Name	Document Type Social Security Number (SSN)	Raymond James uses your Social Security number to verify your identity and ensure you have access to the correct accounts. • Additionally, it helps us protect you apainst unauthorized access and viewing by other sources.	
Date Of Birth	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 Document Type dropdown.	
MM/DD/YYYY		NOTE: You must use the same form of identification you used when you opened your investment account. If you do not know which identification you used, contact your financial advisor or Client Access support.	
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Brokerage Account Num Eg: 12345578			
Excluding Raymond James	Trust or Raymond James Bank account no	umbers.	and the second se
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New Login ID			and the second se
Confirm New Login ID	Login ID Criteria Login IDs must be between 6 and Letters, numbers, and any of the Cannot contain punctuation, such	132 characters. following special characters are acceptable: $ ~ \oplus ~ \# ~ \& ~ _ \cdot . ~$ as apostrophes and accent marks.	
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 CANCEL	
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STEP 2 – PASSWORD AND SECURITY

- 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.

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The password strength meter helps you determine if your password is store amount. New Password: Password: Password: Password: Password: Password: Password: Password: Passwo	To complete the enrollment process, follow the	e 2 steps below and click the NEXT button.	
Hear Personnet:	20- 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
<>>?? Confirm New Password: For a stronger password, use more than 8 characters, and includes special characters. For example D@nny_BOyl			
For a stronger password, use more than 8 characters, and include special characters. For example D@nny_BOyl SetLect SecURITY QUESTIONS Side your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields. Your security questions from the drog down bases below and type your answers in the corresponding fields.			
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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.

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Enrollment for Cli	ent Access	Personal Information	on O Password & Security O N	otifications & Delivery
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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.

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INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER 880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 727.567.1000 RAYMONDJAMES.COM