Online Access allows you to view, track and explore your financial accounts and goals anytime from your desktop or mobile device. Click a topic below for detailed, step-by-step instructions.

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If you have any questions, please contact your Edward Jones team.
Signing Up

Step 1: Sign up by invitation from your Edward Jones team or on your own.

a. If you received an invitation by email, see below.

b. If you’re signing up at edwardjones.com/access or using our mobile app, go to Page 3.

a. Your financial advisor emailed you an invitation.

- Open the email and select the “complete sign-up” link.
- Complete the required fields and create a user ID and password.

Go to Page 4 to continue to Step 2.
b. If you’re signing up at edwardjones.com/access or using our mobile app.

Enter your account number, date of birth and last four digits of your Social Security number.

Create a user ID and password.
Signing Up

- If you already have a verified email address on file with us, you’ll be asked to confirm that it’s correct.
- If you don’t, you’ll need to enter your email address. We’ll send you an email to confirm your address. Simply select the link in the email to verify it.

![Image of online access sign-up]

**Step 2: Read and accept the terms and conditions.**

![Image of terms and conditions]

We’ll ask you to read the terms and conditions and agree.

A note about document delivery

With the new Online Access, we will rely on electronic delivery to provide you important account documents. You’ll receive an email at john.doe@edwardjones.com when documents for the following accounts are ready in Online Access:

- Custodian-1 (xxx-x7510)

We’re committed to protecting your information in the legal manner. This indemnification is binding upon you and your executors, heirs, representatives, successors and assigns.

b) By using the Edward Jones Service for Linking Outside Accounts, you agree that Edward Jones’ Service Providers assisting in the provision of the aggregation services are third-party beneficiaries of the above provisions, with all rights to enforce such provisions as if the Service Providers were a party to this Agreement.

16. Arbitration

You agree that the arbitration agreement contained within the Account Agreement applies to any controversies or disputes arising out of or relating to your use of Online Access, or to these Terms, or any breach thereof.

I have read and agree to the terms

Click to accept terms.
Signing Up

Step 3: Select your security preference.

You can choose from two security options:

a. Sign up for text messaging to receive a security code by text.

b. Answer security questions.

Select to “Enroll in Texting.”

OR Select “Setup Security Questions.”

Click “Continue.”

a. Sign up for text messaging.

Verify your mobile phone number and accept the texting terms and conditions.

Enter your mobile phone number.

Click “Send Verification Text” to consent to terms.
Signing Up

Enter the code you receive by text to finish signing up.

![Sign-Up Screen]

Click “Complete Verification.”

b. Set up security questions.

Choose your security questions and answers, then select “Complete enrollment.”

![Security Questions]

Click “Complete enrollment.”

Once you’ve completed these steps, you should see a welcome screen that features a snapshot of your accounts.
Logging In

With two-step authentication, we'll send you a code to confirm your identity when you log in to Online Access.

▶ Step 1: Log in to Online Access at edwardjones.com/login.

Welcome to Online Access

User ID:
Password:

Save user ID on this device

Click “Log In.”

Forgot user ID or password?  Online Access Security

▶ Step 2: Select one of three options to receive your security code.

We offer three ways you can receive a security code: by text, a phone call or email with security questions.

a. Text me a code (go to Page 8)
   i. Already signed up for text messaging with Edward Jones
   ii. Not signed up for text messaging with Edward Jones

b. Call me with a code (go to Page 12)

c. Email me a code (go to Page 13)
Logging In

a. Text me a code.

Not signed up for text messaging with Edward Jones? Go to Page 10.

Select “Text me a code” and then “Continue.”

Select Your Delivery Method

We’ll need to confirm your identity before you can log in.

- Text me a code
- Call me with a code
- Email me a code

Select “Text me a code.”

Click “Continue” to receive your code.
Logging In

We’ll text a code to the verified mobile number we have on file. Simply enter it to continue.

Choose if you’d like to remember your device.

Click “Log in” to complete your login.
Then select the phone number you’d like to use to receive texts.

Select Your Delivery Method

- Select “Text me a code.”
- Select your preferred number.
- Click “Continue” to receive your code.

If you’ve chosen a number that isn’t listed as “mobile” on your account, you’ll see this pop-up.

Click “Yes” if your selected number can receive texts.
Logging In

Read and accept the terms and conditions.

```
We'll ask you to read the terms and conditions and agree.
```

```
I have read and agree to the terms Click accept terms.
```

We’ll text a code to the mobile number you provided. Simply enter the code to continue.

```
Enter Your Code

A code was sent to mobile phone number XXX-XXX-5550
```

```
Authentication Code:

Did you not receive a code? You can request a new code, select a new delivery option or call 800-441-5203 for assistance.
```

```
Remember my device. Next time I log in from this device, I won't need to enter a security code

Don't remember my device. I prefer to enter a code the next time I log in from this device. This is advisable if this is a public device, one that you don't use often or if you prefer to receive and enter a code each time you log in.
```

Click “Log in” to complete your login.
Logging In

b. Call me with a code.

You'll receive an auto-dialed call containing your security code.

Select Your Delivery Method

Select “Call me with a code.”

Select your preferred number.

Click “Continue” to receive your code.

Enter the code.

Enter Your Code

Choose if you'd like to remember your device.

Click “Log in” to complete your login.
Logging In

c. Email me a code.

We’ll email a security code to your email address on file.

Select "Email me a code."

Click "Continue" to receive your code.

Enter the code.

Click “Continue” to answer your security question.
Logging In

If you haven’t previously set up security questions, you won’t be able to select the “Email me a code” option. However, you can set up security questions later, after you’ve logged in, by visiting the “Settings” page in Online Access. If you have previously set up security questions, you’ll be asked a security question before you can continue.

Choose if you’d like to remember your device.

Click “Log in” to complete your login.
Connecting Accounts

If you'd like to have a more complete view of your financial situation in Online Access, you can connect accounts you have outside of Edward Jones. The information will be shared with your financial advisor, too.

Before you get started, compile your list of outside accounts and login information.

▶ Step 1: Log in to Online Access.

Welcome to Online Access

User ID:

Password:

☐ Save user ID on this device

Click “Log In.”

▶ Step 2: Go to “Accounts” and select the “Connect Accounts” button.

Click “Connect Accounts.”
Connecting Accounts

Step 3: Select a suggested site or enter the name or web address of the financial institution in the search box, select the appropriate site and then select “Search.”

Select a site or enter a financial institution.

Click “Search.”
Connecting Accounts

Step 4: Enter your user ID and password for that specific account, then select “Submit.”

If you do not have your user ID or password, visit your financial institution’s site to locate or create them. Then return to this page to continue.

Edward Jones will not have access to or be able to view or save client user ID and password information for outside accounts.

Some financial institutions use security tokens, challenge questions or passcodes. You may be asked to provide this information on the account credentials screen.
Step 5: Once connected, the outside accounts will appear in the “Accounts” section.

Note: Your account value (lump sum) will display, but your holdings and transactions will not.

You’ll have the option to connect additional accounts at any time.
If you haven't already signed up for text messaging during login, you can sign up by updating your account settings.

▶ Step 1: Log in to Online Access.

Welcome to Online Access

User ID: [ ]

Password: [ ]

☐ Save user ID on this device

Click “Log In.”
Text Messaging

Step 2: Select your name/icon in the top header bar and then “Settings” in the drop-down menu.

- Click “Settings.”
- Click “Manage.”

Step 3: Click the “Enroll in Texting” link next to the number you’d like to use for text messaging.

- Click “Enroll in Texting.”
Text Messaging

Step 4: Read and accept the terms and conditions.

Manage Text Settings

A verification code will be sent to your mobile number. You will enter the verification code on the next screen.

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td>XXX-XXX-XXXX</td>
</tr>
</tbody>
</table>

Don't see the number you would like to use? Add a new number

Scroll and read through the Agreement below or open and read the PDF of the agreement; then check the box and Send Verification Code.

Edward Jones Texting and Two-Step Authentication Terms and Conditions

These terms and conditions (“Terms”) govern your sending of texts to and receipt of texts from Edward Jones (“Texting”), which may include marketing communications, and/or authentication codes to log into Edward Jones Online Access (“Online Access”). By agreeing to these Terms, as well as by using Texting or Online Access, you accept these Terms. These Terms are in addition to, and do not change or modify, any other agreement between you and Edward Jones, including, but not limited to, your Edward Jones Account Agreement(s) and the Online Access Terms and Conditions.

Edward Jones may change these Terms at any time and without notice by updating them on www.edwardjones.com/disclosures. You agree that if you use Texting or Online Access after these Terms are updated, you will be bound by such change. At the time of a change to these Terms, you have the right to reject such change by unsubscribing from Texting in Online Access or via text.

1. About Texting

Texting provides you with information from Edward Jones and a means of communication with your financial advisor. Messages may be sent from numerous short codes and may be in any format, including but not limited to short message service (SMS) or multimedia messaging service (MMS), to the mobile number you have provided (“Mobile Number”).

Texting is a recurring message service and may relate to a wide variety of messages, including texts regarding your account and other operational messages, and Edward Jones account services information or other marketing communications. Message and data rates may apply.

2. Authentication

If you consent to receive authentication codes through Texting, you will also receive other text message communications, which may include marketing communications. For more information about authentication methods for Online Access users, see the Online Access Terms and Conditions.

3. Opt-in

When you sign up for Texting with Edward Jones, you consent to receive via text to your Mobile Number all information and messages Edward Jones chooses to send, including private and sensitive information. By signing up for Texting, you also consent to receiving marketing text messages, which may be sent using an automatic telephone dialing system, from or on behalf of Edward Jones to your Mobile Number. You may opt-out at any time as consent to receive autodialed calls or texts is not a requirement for any Edward Jones product or service.

I have read and agree to the Edward Jones Consent to Texting.

Keep my current settings

Click the box.

Send Verification Code

Click “Send Verification Code.”

Scroll to bottom.
Step 5: You’ll receive a text with a verification code. Enter the code in Online Access. Then select “Complete Verification.”

Step 6: Once your information is verified, you’ll receive a welcome text. Save the number to your phone contacts and use it to communicate with your Edward Jones team.

Text Message
Today 9:30 AM
Your EJ Office: Welcome to Edward Jones texting. Text 56637 to contact your financial advisor's office. Reply HELP for help, STOP to opt out

Save your financial advisor's shortened number.
Step 1: You'll receive an email letting you know you have documents to sign. Select the link in the email.

If you're already logged in to Online Access, you may notice a blue dot by “Documents” in the header. This indicates that you have a new document to review or sign.

Click “View Documents.”

Or you can navigate to your documents by logging in to Online Access and selecting “Documents” in the header.

Click “Documents.”
Step 2: You’ll see the documents that need your signature under the “E-signature” section at the top. Click the “Sign Document” button.
Step 3: Read and accept the Edward Jones E-signature Terms and Conditions.

Edward Jones Electronic Signature Disclosure and Consent

Please read the terms and conditions below, and click "I have read and agree to the terms." to accept.

Edward Jones Electronic Signature Disclosure and Consent

The Electronic Signature Disclosure and Consent ("Consent") sets forth the terms and conditions governing my consent to sign documents electronically through the System. Failure to electronically sign any document by clicking "Decline" instead of signing, I acknowledge that declining may slow the speed at which Edward Jones can complete transactions with me and potentially delay the delivery of services to me.

Required Hardware and Software

Operating Systems: Windows® 7 or above, Mac OS® X or above, iOS 9.0 or above, Android 6.0 or above.

Browsers: Final release versions of Internet Explorer® 11 or Edge 50.0 or above, Mozilla Firefox® 48.0 or above, Safari® 5.0 or above (Mac only), Google Chrome® 43.0 or above. By using the System, I confirm that I have the required hardware and software to use the System, including viewing, downloading, printing and electronically reviewing such documents. At any time, I may contact my Edward Jones Financial Advisor and request a paper copy of any document signed electronically through the System, at no cost.

Effect of Consent

By agreeing to this Consent, I understand that (i) electronically signing and submitting any document employs Edward Jones legally binds me in the same manner as if I had signed a non-electronic form, and (ii) the electronically stored copy of my signature, any written instruction or authorization and any other document provided by Edward Jones is considered to be the true, accurate and complete record, legally enforceable (in any proceeding to the same extent as if such documents were originally generated and maintained in printed form). I agree not to contest the admissibility or enforceability of Edward Jones' electronically stored copy of this Consent and any other documents.

Click to accept terms.
Signing Documents

Step 4: Confirm your identity.

Before you can access your document, you may be required to confirm your identity using either (a) text or (b) identification questions.

a. Text

You must be signed up for text messaging to confirm your identity by text. If you select ‘Text’ and you're not signed up, you’ll see our text messaging terms and conditions.

Click to agree to terms.

Edward Jones®

We'll ask you to read the terms and conditions and agree.
Signing Documents

Once you’ve accepted the texting terms and conditions, or if you’ve previously accepted the terms, you’ll receive a code to confirm your identity.

Select “Send Text” to receive an authentication code from Edward Jones.

Enter the authentication code.

Click “Complete Verification.”

b. Identification Questions

If your document requires identification questions, you’ll see the following screen. Answer the questions, then click “Next” to continue.

What color is your 2005 Ford F150?

Note: Edward Jones does not generate these questions, nor do we see or retain the selected answers.
Signing Documents

▶ Step 5: Open the document(s) and sign each box.

Check each box as indicated and click the “Sign” button to capture your e-signature.

▶ Step 6: Select “Finish” to complete signing. The document will move to “Signed Documents” once all parties have signed and will be stored there for 12 months.