Online Access allows you to view, track and explore your financial accounts and goals anytime from your desktop or mobile device. Use this guide to learn how to:

- Sign up for service .......................................................... Page 2
- Log in using two-step authentication .................................. Page 8
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- Electronically communicate with your Edward Jones team .. Page 20
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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.

Create Your User ID & Password

Tips for creating your user ID:
- Needs to be 6-20 characters
- Cannot contain spaces or special characters
- Cannot contain your account number

Password:

Passwords are case sensitive and:
- Need to be 8-60 characters
- Need to include at least 2 letters and 1 number, or 1 special character - excluding: @, (), [], {, :, ' , < >
- Cannot be the same as your user ID
- Cannot contain spaces

Retype Your Password:

Click “Next.”
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.

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

Click to accept terms.
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.

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

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

Click “Complete Verification.”

*b. Set up security questions.*

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

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

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.”

► 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 9)
   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 13)
c. Email Me a Code (go to Page 14)
a. **Text Me a Code.**

i. Already signed up for text messaging with Edward Jones?

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

### i. Already signed up for text messaging with Edward Jones

Select “text me a code” and then “continue.”

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![Select Your Delivery Method](image)

- **Text me a code**
  - XXX-XXX-1696
- Call me with a code
- Email me a code

Click “Continue” to receive your code.
Logging In Using Two-step Authentication

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.

Enter Your Code

Choose if you’d like to remember your device.

Click “Log in” to complete your login.

**ii. Not signed up for text messaging with Edward Jones**

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

Select Your Delivery Method

Select “Text me a code.”

Click “Continue” to receive your code.
Logging In Using Two-step Authentication

Then select the phone number you’d like to use to receive texts.

Select Your Delivery Method

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

- Text me a code
  - XXX-XXX-8016
  - XXX-XXX-0131
  - XXX-XXX-1481
  - XXX-XXX-1556
- Call me with a code
- Email me a code

Choose the number that will receive the text.

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.

Are you sure you would like to receive a text to this number?

Click “Yes” if your selected number can receive texts.
Logging In Using Two-step Authentication

Read and accept the terms and conditions.

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

Click accept terms.

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

Enter Your Code

Choose if you’d like to remember your device.

Click “Log in” to complete your login.
Logging In Using Two-step Authentication

b. Call Me with a Code.

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

Select Your Delivery Method

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

Select “Call me with a code.”

Select your preferred number.

Click “Continue” to receive your code.

Enter the code.

Choose if you’d like to remember your device.

Click “Log in” to complete your login.
Logging In Using Two-step Authentication

c. Email Me a Code.

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

Select Your Delivery Method

- Text me a code
  XXX-XXX-5550
- Call me with a code
  - Email me a code

Select "Email me a code."

Click "Continue" to receive your code.

Enter the code.

Enter Your Code

A code was sent to email ***ins@edwardjones.com. Check your email and keep this window open to enter the code you receive.

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.

Resend Code | Select New Delivery Option

Click "Continue" to answer your security question.
Logging In Using Two-step Authentication

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 Outside 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.

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]

Log In

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

Accounts

Total Value Edward Jones Value
$3,613,866.71 $3,613,866.71

Investments Account Type Goal

Trad IRA-1 Traditional IRA Select $1,181,069.85
Trad IRA-2 Traditional IRA Select $35,805.20
Roth IRA-1 Roth IRA Select $0.00
Joint-1 Joint WROS $764.49
Trust-4 Living Trust Unified Managed Account -$1,444.42
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.”
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.
Connecting Outside Accounts

▶ 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.
Communicating with Your Edward Jones Team

Sending a Secure Message

Go to “My Team.” You’ll find this section either at the top of the screen or under the menu (three horizontal lines) to the left of the Edward Jones logo – depending on the size of your browser window. Once the page loads, select the “New Message” button and enter your message.
Communicating with Your Edward Jones Team

Text Messaging

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

Log In  Forgot user ID or password?  Online Access Security  Click “Log In.”
Communicating with Your Edward Jones Team

**Step 2:** Select your name/icon in the top header bar and then “Settings” in the dropdown window.

![Screen shot of Edward Jones settings page]

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

![Screen shot of Edward Jones settings page showing phone number enrollment]
Communicating with Your Edward Jones Team

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-XXXX-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. Messages and preferences.

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.

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

Click the box.

Click "Send Verification Code."
Communicating with Your Edward Jones Team

▶ 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.

Save your financial advisor’s shortened number.
Signing Documents in Online Access

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.

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

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."
Signing Documents in Online Access

Step 4: Confirm your identity.

Before you can access your document, you’ll be required to confirm your identity using either (a) text or (b) ID 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.

Edward Jones

Edward Jones Texting Terms and Conditions

You agree that Texting is provided solely for your convenience and is not to be considered a substitute for other methods of communication, including direct contact with Edward Jones. Texting may not be available for all instructions and may not be available in all locations. Texting is not guaranteed to be accurate. You agree to review the information available on Online Access or contact your financial advisor before basing any decision on a text. Texting is as of a certain point in time, and at any time prior to or after you receive a text message, circumstances may have changed and the text may no longer be accurate. You agree not to use Texting to provide instructions to Edward Jones and acknowledge that Edward Jones has no obligation to act on instructions you provide via Texting.

Consent to these Terms is not a condition of purchasing any goods or services.

I have read and agree to the terms

Click to agree to terms.

For assistance, call 800-441-5203
Monday - Friday 7 a.m. - 9 p.m. CT | Saturday & Sunday 8 a.m. - 4 p.m. CT
Signing Documents in Online Access

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 Question

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 in Online Access

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.