

# Online Access User Guide



► 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
Connect accounts you hold outside of Edward Jones.....	Page 16
Electronically communicate with your Edward Jones team.....	Page 20
Sign electronic documents .....	Page 25

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.

- If you received an invitation by email, see below.
- If you're signing up at [edwardjones.com/access](https://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.

Edward Jones®

Online Access Sign-Up

Create Your User ID & Password

Social Security Number:

Last 4 digits

User ID:

Tips for creating your user ID:

- Needs to be 6-20 characters
- Cannot contain spaces or special characters
- Cannot contain your account number

Password:

Show 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:

Next >

Click “Next.”

Go to Page 4 to continue to Step 2.

# Signing Up

*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.

Edward Jones®

Online Access Sign-Up

Verify Your Identity

Account Number:

First 8 digits

Date of Birth:

MM/DD/YYYY

Social Security Number:

Last 4 digits

Next >

Click "Next."

Create a user ID and password.

Edward Jones®

Online Access Sign-Up

Create Your User ID & Password

User ID:

Tips for creating your user ID:

- Needs to be 6-20 characters
- Cannot contain spaces or special characters
- Cannot contain your account number

Password:

Show 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:

Next >

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.

Edward Jones®

Online Access Sign-Up

Verify Your Email

Your email address on file:  
john.doe@edwardjones.com

Next >

Click "Next."

## ► Step 2: Read and accept the terms and conditions.

Edward Jones®

Terms and Conditions

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 [email@email.com] when documents for the following accounts are ready in Online Access:

- Single-I (xxx-x2345)
- Joint-I (xxx-x3456)

You can receive paper duplicates by U.S. mail of some of the documents we deliver electronically. To review your paper copy settings, please visit the Snapshot page and select Document Options from the drop-down menu after you've logged in to Online Access.

[Learn more about electronic communications in Online Access](#)

(iii) in a negligent or  
negligent 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

I decline. Return to login

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

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.

The screenshot shows the 'Online Access Setup' screen with the title 'Select Your Security Preference'. There are two radio button options: 'Enroll in Texting' (selected) and 'Setup Security Questions'. A blue callout box points to the 'Enroll in Texting' option with the text 'Select to "Enroll in Texting."'. Another blue callout box points to the 'Setup Security Questions' option with the text 'OR Select "Setup Security Questions."'. A yellow 'Continue >' button is highlighted with a red box, and a blue callout box points to it with the text 'Click "Continue."'. Below the radio buttons, there is a list of benefits for enrolling in texting: 'Text with your Edward Jones office', 'Sign in to Online Access with additional security choices', and 'Sign up for text alerts'.

### a. Sign up for text messaging.

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

The screenshot shows the 'Online Access Sign-Up' screen with the title 'Verify Your Mobile Phone'. There is a text input field for 'Mobile Phone Number:' with a red box around it. A blue callout box points to the field with the text 'Enter your mobile phone number.' Below the field, there is a link that says 'Set up challenge questions instead.' Below this, there is a section titled 'Edward Jones Texting Terms & Conditions' with a scrollable area containing the following text: 'These terms and conditions ("Terms") govern your sending of texts to Edward Jones ("Texting"), including the use of a mobile phone number to receive a security code by text message. By clicking the "Continue" button, you are agreeing to these terms and conditions.' Below the terms, there are two sections: '5. Help' and '6. Delivery of Code'. The '5. Help' section says: 'To get help, reply HELP to any message you receive from Edward Jones or text HELP to 31268 from your Mobile Number. You may also go to www.edwardjones.com/texting or call 855-283-3677 for help.' The '6. Delivery of Code' section says: 'You acknowledge that the Code may not be sent on a "real time" basis and that there may be a delay between the time you request the Code and the time you receive the Code. Edward Jones reserves the right to suspend or stop Authentication at any time and without notice. You agree not to respond to Code texts by return text and that Edward Jones will not be responsible to act upon such responses.' At the bottom, there is a yellow 'Send Verification Text' button with a red box around it. A blue callout box points to the button with the text 'Click "Send Verification Text" to consent to terms.' The button text is 'Send Verification Text' and 'I have read and accept the terms'.

# Signing Up

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

The screenshot shows the 'Online Access Sign-Up' page for Edward Jones. The page has a yellow header with the Edward Jones logo. Below the header, the title 'Online Access Sign-Up' is followed by 'Verify Your Mobile Phone'. A progress indicator shows five dots, with the fifth dot highlighted in yellow. Below this, a message states: 'A verification code has been sent to XXX-XXX-XXXX'. There is a text input field labeled 'Enter Verification Code:'. Below the input field is a yellow button with the text 'Complete Verification >'. A blue callout bubble points to this button with the text 'Click "Complete Verification."'.

## *b. Set up security questions.*

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

The screenshot shows the 'Online Access Setup' page for Edward Jones. The page has a yellow header with the Edward Jones logo. Below the header, the title 'Online Access Setup' is followed by 'Security Questions'. A progress indicator shows five dots, with the fifth dot highlighted in yellow. Below this, a message states: 'The answers to your questions will help us confirm your identity later'. There are three questions, each with a dropdown menu and a text input field. Question 1 has a dropdown menu with 'Select One' and a dropdown arrow, and a text input field with 'Enter your answer'. Question 2 has a dropdown menu with 'Select One' and a dropdown arrow, and a text input field with 'Enter your answer'. Question 3 has a dropdown menu with 'Select One' and a dropdown arrow, and a text input field with 'Enter your answer'. At the bottom of the page is a yellow button with the text 'Complete enrollment >'. A blue callout bubble points to this button with the text 'Click "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](https://edwardjones.com/login).

Edward Jones

Welcome to Online Access

User ID:

Password:

☐ Save user ID on this device

Click "Log In." **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 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)

# Logging In Using Two-step Authentication

*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.”

Edward Jones

Select Your Delivery Method

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

☒ Text me a code

XXX-XXX-1696

☐ Call me with a code

☐ Email me a code

Continue >

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.

**Edward Jones**

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.

[Resend Code](#) | [Select New Delivery Option](#)

**Security Preference**

☒ 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.)

**Log in >**

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."

**Edward Jones**

Select Your Delivery Method

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

☒ Text me a code  
XXX-XXX-1696

☐ Call me with a code

☐ Email me a code

**Continue >**

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.

Edward Jones®

Select Your Delivery Method

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

☒ Text me a code

Select "Text me a code."

☒ XXX-XXX-8016

☐ XXX-XXX-0131

☐ XXX-XXX-1481

☐ XXX-XXX-1556

Select your preferred number.

Choose the number that will receive the text.

☐ Call me with a code

☐ Email me a code

Continue >

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.

Edward Jones®

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

Yes >

No

Click "Yes" if your selected number can receive texts.

# Logging In Using Two-step Authentication

Read and accept the terms and conditions.

**Edward Jones**

**Review Terms and Conditions**

Since this is your first time texting with us, please review our Texting Terms and Conditions. With texting, you'll be signed up to text with your Edward Jones office, receive appointment reminders and access account security features.

**Edward Jones Texting and Two-Step Authentication Terms and Conditions** [Print & Download \(PDF\)](#)

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](http://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, authentication codes or other operational messages, and Edward Jones account services information or other marketing communications by account and preferences.

**8. Privacy**

Edward Jones respects your right to privacy. To view our privacy policy, please click on the link provided below. Text message communications, which contain private or sensitive information, and you agree to safeguard your Mobile Device, and failure to safeguard your Mobile Device may result in the loss of information. You acknowledge that messages you send to Edward Jones may not be private or confidential and may be received, stored, or distributed by Edward Jones in its sole discretion.

**9. Delivery of Texts and Codes**

Texts will be sent periodically, at various times, and may be sent any day or time. You acknowledge that texts from Edward Jones may not be sent on a "real time" basis, and may be sent at the sole discretion of Edward Jones. You acknowledge that a code may not be sent on a "real time" basis and there may be a delay between the time you request a code and the time you receive the code. Edward Jones reserves the right to suspend or stop Texting and/or authentication at any time and without notice. You acknowledge that texts you send to Edward Jones may not be received by Edward Jones and that it is your responsibility to ensure Edward Jones receives any message you communicate via text.

**10. Texting Is for Convenience Only**

You agree that Texting is provided solely for your convenience and is not to be relied upon. 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 >](#) [I decline](#)

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

**Edward Jones**

**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.

[Resend Code](#) | [Select New Delivery Option](#)

**Security Preference**

☒ 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.)

[Log in >](#)

# Logging In Using Two-step Authentication

## b. Call Me with a Code.

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

Edward Jones®

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

Select "Call me with a code."

☒ XXX-XXX-6546

Select your preferred number.

☐ XXX-XXX-5550

Select the number at which you would like to be called and click the Continue button below to consent to an auto dialed phone call.

☐ Email me a code

Continue >

Click "Continue" to receive your code.

Enter the code.

Edward Jones®

Enter Your Code

✔ A code was sent to 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.

[Resend Code](#) | [Select New Delivery Option](#)

Security Preference

☐ 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.)

Log in >

Click "Log in" to complete your login.

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# Logging In Using Two-step Authentication

*c. Email Me a Code.*

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

Edward Jones®

Select Your Delivery Method

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

☐ Text me a code

XXX-XXX-5550

☐ Call me with a code

☒ Email me a code

Continue >

Click "Continue" to receive your code.

Enter the code.

Edward Jones®

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](#)

Continue >

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.

Security Question

Edward Jones®

Answering this security question helps us to verify your identity.

In what city or town did you meet your spouse/partner?

Answer a different question.

Security Preference

☐ 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.)

Log in >

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.

Edward Jones

MAKING SENSE OF INVESTING

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."

## ► Step 2: Go to "Accounts" and select the "Connect Accounts" button.

Edward Jones

SnapshotAccountsGoalsMy Team & MessagesDocumentsTransfersMore

TS TaylorLog Out

Accounts

Total Value

\$3,613,866.71

Edward Jones Value

\$3,613,866.71

Account Actions

Connect Accounts

Overview

Activity

Investments	Account #	Account Type	Goal	Value
<div>Edward Jones</div> Trad IRA-1 Edward Jones	****1522	Traditional IRA Select		\$1,181,069.85
<div>Edward Jones</div> Trad IRA-2 Edward Jones	****3868	Traditional IRA Select		\$35,805.20
<div>Edward Jones</div> Roth IRA-1 Edward Jones	****6163	Roth IRA Select		\$0.00
<div>Edward Jones</div> Joint-1 Edward Jones	****1551	Joint WROS		\$764.49
<div>Edward Jones</div> Trust-4 Edward Jones	****2921	Living Trust Unified Managed Account		-\$1,444.42

# Connecting Outside 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.”

**Edward Jones** Snapshot Accounts Goals My Team & Messages Documents Transfers More TS Taylor Log Out











### Link Accounts

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

Select a financial institution from this list or enter the name in the search field below.

Q Institution name SEARCH

**SUGGESTED SITES (based on your transactions)**

 Citibank (online.citibank.c... <a href="https://online.citibank.com/">https://online.citibank.com/</a>	 PayPal <a href="https://www.paypal.com/in/we...">https://www.paypal.com/in/we...</a>
<b>MOST POPULAR SITES</b>	
 Transamerica Retirement... ✓ <a href="https://www.trretire.com/">https://www.trretire.com/</a>	 Fidelity Investments <a href="http://www.fidelity.com/">http://www.fidelity.com/</a>
 Vanguard - Investments an... <a href="https://investor.vanguard.com/c...">https://investor.vanguard.com/c...</a>	 Chase <a href="https://www.chase.com/">https://www.chase.com/</a>
 Bank of America <a href="https://www.bankofamerica.com/">https://www.bankofamerica.com/</a>	 Thrift Savings Plan <a href="https://www.tsp.gov/index.html">https://www.tsp.gov/index.html</a>
 Principal Financial Group (... <a href="https://www.principal.com/">https://www.principal.com/</a>	 TIAA <a href="https://www.tiaa-cref.org/publi...">https://www.tiaa-cref.org/publi...</a>

**TIPS**

You can link many different types of financial accounts, including:

- Bank accounts (Excluding credit card accounts)
- Retirement accounts
- Investment accounts
- Insurance policies

Include any accounts that might help your financial advisor understand your overall financial situation.


Select a site or enter a financial institution.


**Edward Jones** Snapshot Accounts Goals My Team & Messages Documents Transfers More TS Taylor Log Out


### Link Accounts


1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS


Q Wells Fargo SEARCH


 Wells Fargo  
<https://www.wellsfargo.com/>


 Wells Fargo Advisors  
<https://www.wellsfargoadvisors.com/>

 Wells Fargo HSA  
<https://www.wellsfargo.com/>

 Wells Fargo - The Private Bank  
<https://www.wellsfargo.com/the-private-bank/>

 Wells Fargo (Your Retirement Plan)  
<https://www.wellsfargo.com/retirementplan/>

 Wells Fargo/Equiniti Shareowner Online  
<http://www.wellsfargo.com/>

 Wells Fargo Asset Management  
<https://www.wellsfargofunds.com/>

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.

The screenshot displays the 'Link Accounts' interface on the Edward Jones platform. The top navigation bar includes the Edward Jones logo and links for Snapshot, Accounts, Goals, My Team & Messages, Documents, Transfers, and More. A user profile section shows 'TS Taylor' and a 'Log Out' button. The main content area is titled 'Link Accounts' and features three steps: 1. SELECT A SITE, 2. VERIFY CREDENTIALS (active), and 3. VIEW ACCOUNTS. Below the steps, a message instructs the user to 'Enter your Wells Fargo Advisors online account credentials.' The login form is titled 'LOG IN TO YOUR ACCOUNT' and includes the Wells Fargo Advisors logo and website URL. It contains three input fields: 'Username', 'Password' (with a 'SHOW' toggle), and 'Re-enter Password'. At the bottom of the form are '< BACK' and 'SUBMIT >' buttons. A red box highlights the 'SUBMIT >' button, and a callout bubble points to it with the text 'Click “Submit.”'. A 'TIPS' section on the right provides guidance for users who don't have their credentials. At the bottom of the form, a disclaimer states that credentials are used for real-time verification and secure connection establishment, followed by the Thawte logo.

Edward Jones

Snapshot Accounts Goals My Team & Messages Documents Transfers More ▼

TS Taylor Log Out

Link Accounts

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

Enter your Wells Fargo Advisors online account credentials.

LOG IN TO YOUR ACCOUNT

WELLS FARGO ADVISORS Wells Fargo Advisors  
www.wellsfargoadvisors.com

Username  
Username

Password  
Password SHOW

Re-enter Password  
Re-enter Password

< BACK SUBMIT >

Click “Submit.”

By providing your credentials, we verify in real time that you own the account you want to link. We then use this information to establish a secure connection with your financial institution.

thawte

TIPS  
Trouble linking accounts?  
If you don't have your username or password, visit your financial institution's site to locate or create them. Then return to this page to continue.

TRUSTED SECURITY

# 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.

Edward Jones

SnapshotAccountsGoalsMy Team & MessagesDocumentsTransfersMore

TS TaylorLog Out

### Accounts

Total Value  
\$909,967.99








Edward Jones Value  
\$816,249.43




Account Actions


Connect Accounts

Overview

Activity

Investments	Account #	Account Type	Goal	Value
 Single-1 Edward Jones	****2707	Individual	Retirement	\$379,281.85
 Single-2 Edward Jones	****4847	Individual Advisory	Retirement	\$138,494.96
 Trad IRA-3 Edward Jones	****9188	Traditional IRA Select	Retirement	\$193,898.33
 Roth IRA-1 Edward Jones	****3644	Roth IRA Select	Retirement	\$43,890.31
 Individual 529-1 Edward Jones	****2702	Ind 529 Plan	Edward's Education	\$11,481.63
 DAG INVESTMENT  Dag Site				\$79,629.00 1/22/2020 10:58 AM

Insurance & Annuities	Account #	Account Type	Goal	Value
 CENTENNIAL G II UL PROTECTIVE LIFE INS CO	*****0568	Universal Life Insurance		\$49,202.35
 DAG INSURANCE  Dag Site				\$5,000.00 1/21/2020 4:34 PM

Loans & Credits	Interest Rate	As of Date	Approved Credit	Available Credit	Balance
 Single-1 Edward Jones	5.5%	1/22/2020	\$220,351.92	\$166,680.58	\$53,671.34

# 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.

Edward Jones

SnapshotAccountsGoalsMy Team & MessagesDocumentsTransfersMore

TS TaylorLog Out

My Team

Messages

My Team, Me

From My Team Test

8/7/2017

Here's that portfolio document we chatted about.

1 Document

Me, My Team

College savings

7/7/2017

Man! This new site is great! Thank you so much for your help.

Me, My Team

Son's SSN

7/10/2017

1 Document

Inbox messages will be automatically deleted after 90 days.

JANE SMITH

Financial Advisor

Judy Smith

Sr. Branch Office Administrator

John Doe

Branch Office Administrator

PHONE

(000) 000-0000

HOURS

Monday:

8:00AM - 5:00PM

Tuesday:

8:00AM - 5:00PM

Wednesday:

8:00AM - 5:00PM

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# 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

Edward Jones

MAKING SENSE OF INVESTING

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.

Edward Jones Snapshot Accounts Goals My Team & Messages Documents Transfers More

TS Taylor Log Out

Click “Settings.”

Settings

Log Out

User ID: XXX-XX774-1-3 NAME: Joint-1 Change

Settings

Account Nicknames

XXX-XX774-1-3	Joint-1
XXX-XX206-1-4	Joint-2
XXX-XX025-1-3	Joint-3
XXX-XX875-1-1	Custodian-1
XXX-XX349-1-4	Trad IRA-2
XXX-XX397-1-2	Trad IRA-1
XXX-XX350-1-0	Roth IRA-1
XXX-XX112-1-5	Roth IRA-2

Bill Payment: Not signed up Sign Up

Alerts Manage

Closed Accounts:

No recently closed accounts are available to display for your user ID.

Security Settings

Security Preference

☐ 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. (This is advisable if this is a public device, one that you don't use often or if you forget the device and enter a code each time you log in.)

Contact Information

Email Address: email-address@email.com Manage

Address: 123 Street, City, ST 00000 Manage

Phone / Text: 000-000-0000 Mobile Manage

Click “Manage.”

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

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TS Taylor Log Out

Manage Phone / Text

My Phone Numbers

Type	Number	
Primary	Mobile	XXX-XXX-XXXX

Edit | Delete Enroll in Texting

Click “Enroll in Texting.”

# Communicating with Your Edward Jones Team

## ► Step 4: Read and accept the terms and conditions.

**Edward Jones**SnapshotAccountsGoalsMy Team & MessagesDocumentsTransfersMore ▾TS TaylorLog Out

## Manage Text Settings

A verification code will be sent to your mobile number. You will enter the verification code on the next screen. [About texting](#)

Type	Number
Mobile	XXX-XXX-XXXX

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. [Print & Download \(PDF\)](#) [Download Adobe® Reader® for free](#)

### 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](http://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, authentication codes, other operational messages, and Edward Jones account services information or other marketing communications. Messages may be sent at any time, including during late evening or night hours, and may be sent to your mobile number even if you are not currently logged into Online Access.
- 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](#)[Send Verification Code](#)

Scroll to bottom.

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."

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## Manage Text Settings

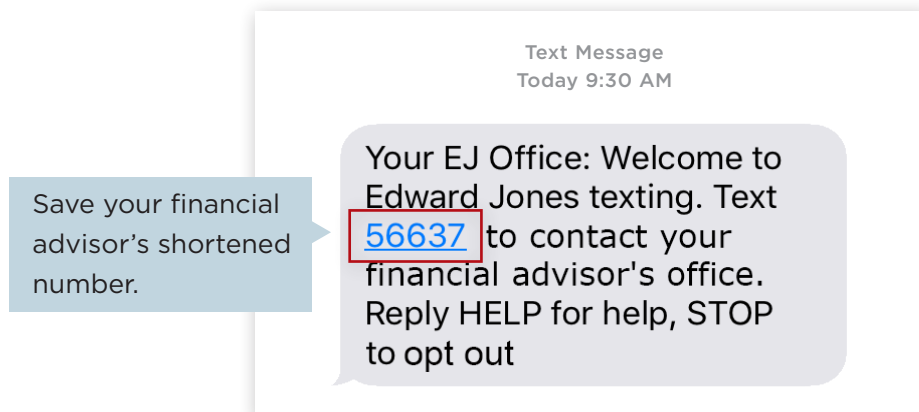
A verification code was sent to XXX-XXX-XXXX. If you have the verification code, enter it here to complete your verification for Edward Jones texting.

Can't find your code? [Send me another verification code](#)

[Finish Later](#) [Complete Verification](#)

Click "Complete Verification."

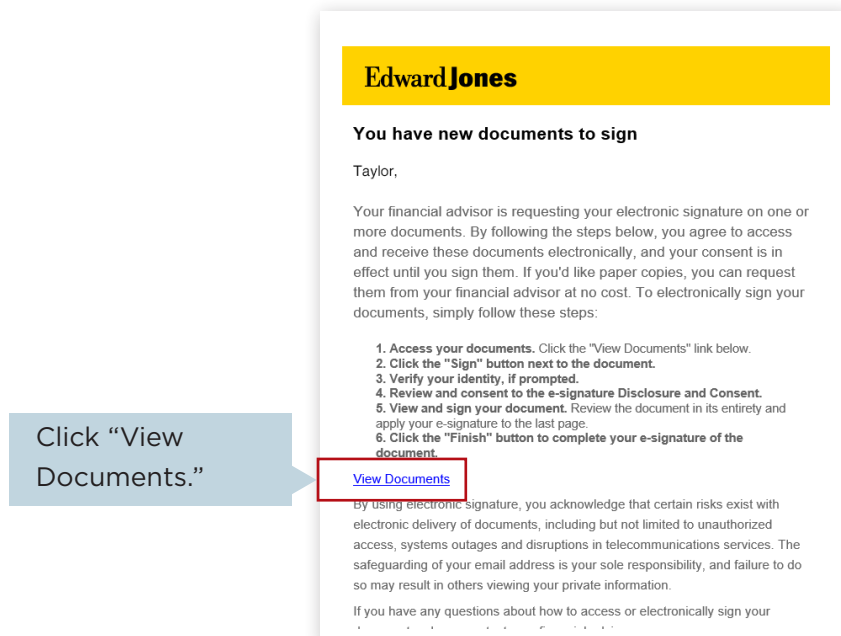
- ▶ Step 6: Once your information is verified, you'll receive a welcome text. Save the number to your phone contacts and use it to communicate with your Edward Jones team.



# 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.

The screenshot shows the Edward Jones online portal. The top navigation bar includes the Edward Jones logo and links for Snapshot, Accounts, Goals, My Team & Messages, Documents (which is active), Transfers, and More. On the right, there is a user profile for Taylor (TS) and a Log Out button. The main content area is titled 'Documents' and includes a disclaimer: 'Please note that some documents may not be available online. You can always obtain a copy of any document, including historical or those for closed accounts, by contacting your local office.' Below this is an 'E-Signature' section. It contains a document titled 'Individual/Joint Account Authorization' with a status of 'Joint-1 • \*\*\*\*5750'. The document was posted on 1/14/2020 and expires on 2/13/2020. A 'Sign Document' button, represented by a document icon and the text 'Sign Document', is highlighted with a red rectangle. A callout box points to this button with the text 'Click "Sign Document."'.

# Signing Documents in Online Access

## ► Step 3: Read and accept the Edward Jones E-signature Terms and Conditions.

**Edward Jones** Snapshot Accounts Goals My Team & Messages Documents Transfers More TS Taylor Log Out

Edward Jones Electronic Signature Disclosure and Consent ×

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

**Edward Jones Electronic Signature Disclosure and Consent**  
[Download PDF](#)  
This Electronic Signature Disclosure and Consent ("Consent") sets forth the terms and conditions governing my consent to sign documents electronically through, and my use of, the Edward D. Jones & Co., L.P. (Edward Jones) Electronic Signature System (System). I may decline 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 6.1 or above.  
**Browsers:** Final release versions of Internet Explorer® 11.0 or Edge 10.0 or above; Mozilla Firefox® 48.0 or above; Safari® 5.0 or above (Mac or iOS only), Google Chrome v53 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 receiving 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 My Consent**  
By agreeing to this Consent, I understand that (i) electronically signing and submitting any document(s) to Edward Jones legally binds me in the same manner as if I had signed in a non-electronic form, and (ii) the electronically stored copy of my signature, any written instruction or authorization and any other document provided to me 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.  

I have read and agree to the terms

I Decline

Click to accept 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

## ► 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 Texting Terms and Conditions

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

### Edward Jones Texting Terms and Conditions

...electronically sign documents.

You agree that Texting is provided solely for your convenience and is not to be relied upon as a guarantee 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

I Decline

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

Click to agree to terms.

# 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.

Edward Jones®

Text Authentication

In order to view this document, we will send you a verification code which you will enter on the next screen.

Authenticating Signer Name: **Catina Smith**

Phone Number:

+1 314-515-2000

SEND TEXT

CANCEL

If you do not have access to your mobile phone at this time, select "Cancel" and retry when you have access.

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

Second Step

Text Authentication

A verification code has been sent to your mobile phone.

If you have the verification code, enter it here:

COMPLETE VERIFICATION

If you do not receive a text message, select your browser's back button, verify

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.

Edward Jones®

Identification Questions

Before you may electronically sign the documents, it's important that we confirm your identity. To do so, we ask that you please answer the following questions, which are based on information taken from **public records**.

Please note: **None of this information is supplied to Edward Jones or anyone but you.**

In which of the following counties have you ever lived or owned property?

☒ Davidson, North Carolina

☐ Johnston, North Carolina

☐ Durham, North Carolina

☐ Wake, North Carolina

☐ Forsyth, North Carolina

☐ I have never lived in any of these counties

What color is your '2005 Ford F150'?

☐ Chrome

☒ Light Blue

☐ Copper

☐ Mauve

☐ Gold

☐ I have never been associated with this vehicle

Which of the following boats or watercrafts have you owned?

☐ 13 Ft. Mohawk

☒ 33 Ft. Brunswick Family Boat Co

☐ 16 Ft. Sugar Sand Marine

☐ 40 Ft. Mainship Corporation

☐ 17 Ft. Godfrey Marine Company

☐ None of the above

In which of the following states does "Jane Doe" currently live or own property?

☐ Arizona

☐ Mississippi

☒ Colorado

☐ New Hampshire

☐ Kansas

☐ None of the above or I am not familiar with this person

CANCEL

NEXT

Click "Next."

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.

**NEXT**

3. I have read and reviewed the beneficiary designation above and confirm the designation is accurate and complete.  
4. As the account owner, or an authorized representative of the account owner acting on specific authority, I have the authority to designate, change or revoke the beneficiaries for this account.  
5. I will receive an Edward Jones brokerage statement that will serve as my custodial account statement and no other separate account statements will be provided.  
6. Edward Jones Trust Company may appoint one or more of its affiliates, including Edward Jones, to provide some or all its services under the Custodial Agreement.

**Must Read and Select** ☒ I have received, read and understand the Edward Jones Trust Company Traditional Individual Retirement Account Custodial Agreement and agree to its terms and have received the Confirmation of Authorizations and Services, Brochure Supplements, Disclosure Statement, Schedule of Fees for IRAs, Privacy Notice and Revenue Sharing Disclosure.

**THE CUSTODIAL AGREEMENT CONTAINS ON PAGE 6 IN SECTION 17, A BINDING ARBITRATION PROVISION WHICH MAY BE ENFORCED BY THE PARTIES.**

**Sign Here** 

Owner/Custodian/Guardian's Signature \_\_\_\_\_ Social Security Number \_\_\_\_\_ 2/6/2017 \_\_\_\_\_  
Date  
**John Doe** \_\_\_\_\_ esign1test@edwardjones.com \_\_\_\_\_  
Printed Owner/Custodian/Guardian's Name Email Address

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**FINISH** Click “Finish.”

## ► 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.




**Edward Jones** Snapshot Accounts Goals My Team & Messages Documents Transfers More TS Taylor Log Out

Documents **Signed Documents** From My Team Proxies & Other Shareholder Materials

Search (e.g. Document Name, 2019-05-01, etc.)

All Accounts

**Signed Documents**  
Signed documents are available for 12 months.

Account	Posted Date	Signed Date	Download
Individual Retirement Account Authorization Matt IRA-1 • ****4444	11/14/2019	11/15/2019	
Guided Fund Account Agreement xMatt IRA-2 • ****5555	11/7/2019	11/7/2019	
Individual/Joint Account Authorization Matt Single-1 • ****1234	9/27/2018	11/11/2019	
Individual/Joint Account Authorization Matt Single-1 • ****1234	9/27/2018	11/11/2019	