Online Access: Account Sharing User Guide

Share your accounts in view only mode with another individual who is enrolled in Online Access such as a spouse or an adult child.

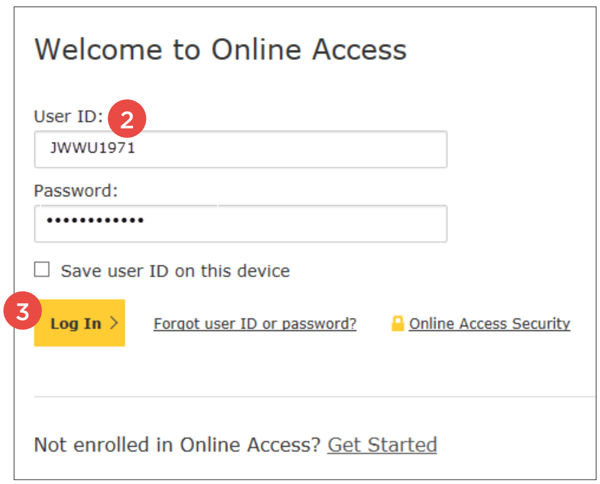
Note: Both accounts must be enrolled in Online Access to complete the Account Sharing process. Before you start the request to share your account, we recommend that you first confirm with the recipient of your request that their account is enrolled and they are able to log in to Online Access.

Step 1:

To share your account view with another Edward Jones Online Access user, you must enable this feature on your own using Online Access.

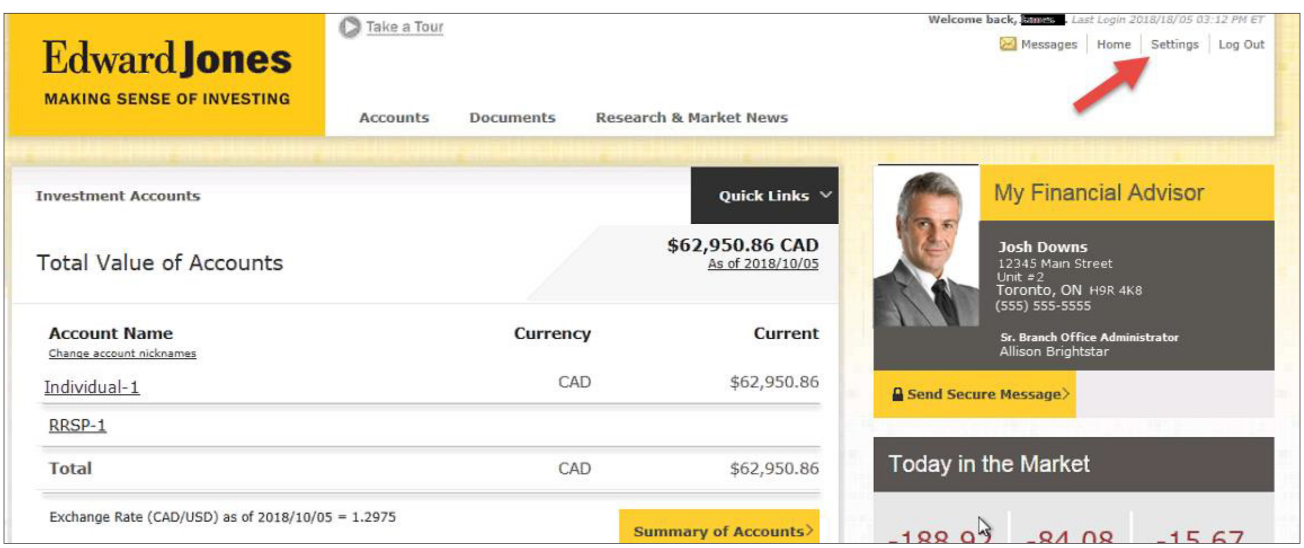
- Login to your Online Access account through edwardjones.ca.

1. Click **Account Login.**
2. Enter **User ID** and **Password.**
3. Click **Log In >.**



Step 2:

- Click **Settings.**



Steps continue on next page.

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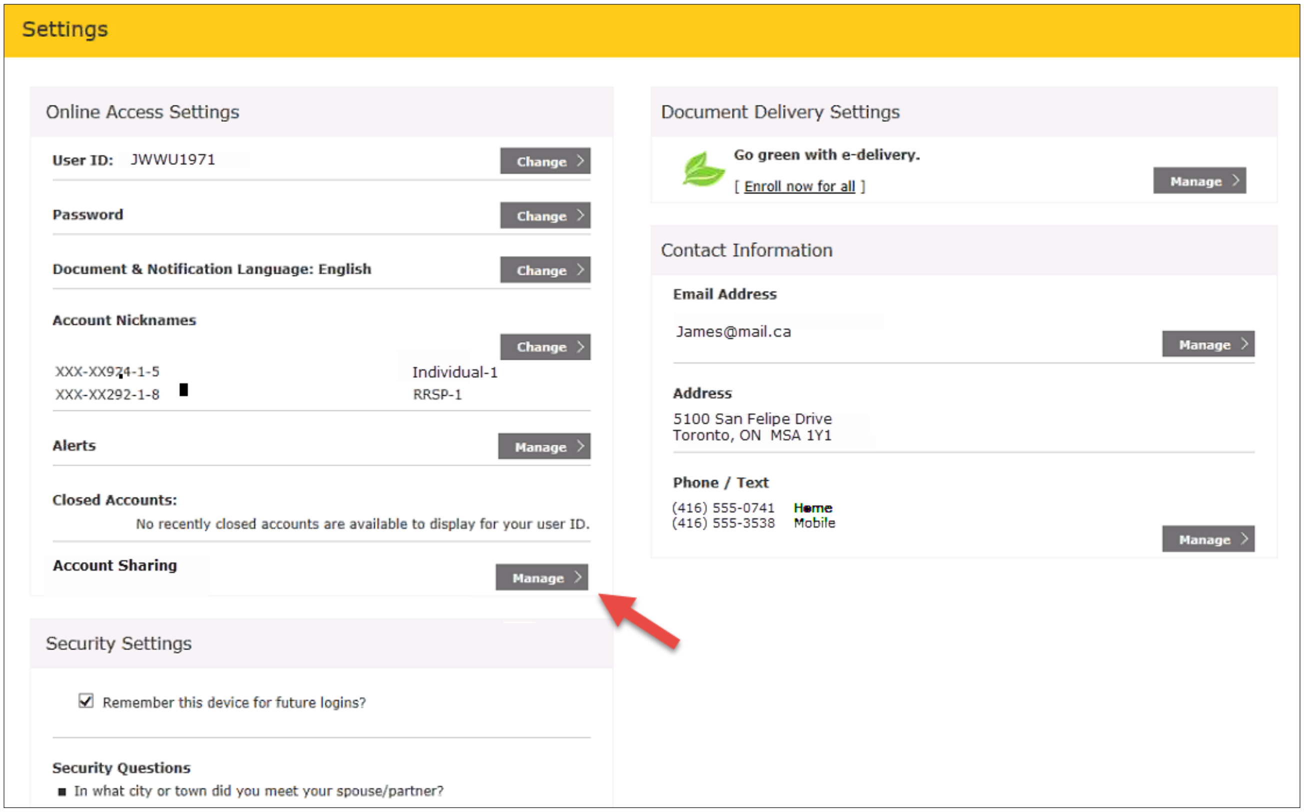
Step 3:

Locate Account Sharing and click **Manage.**

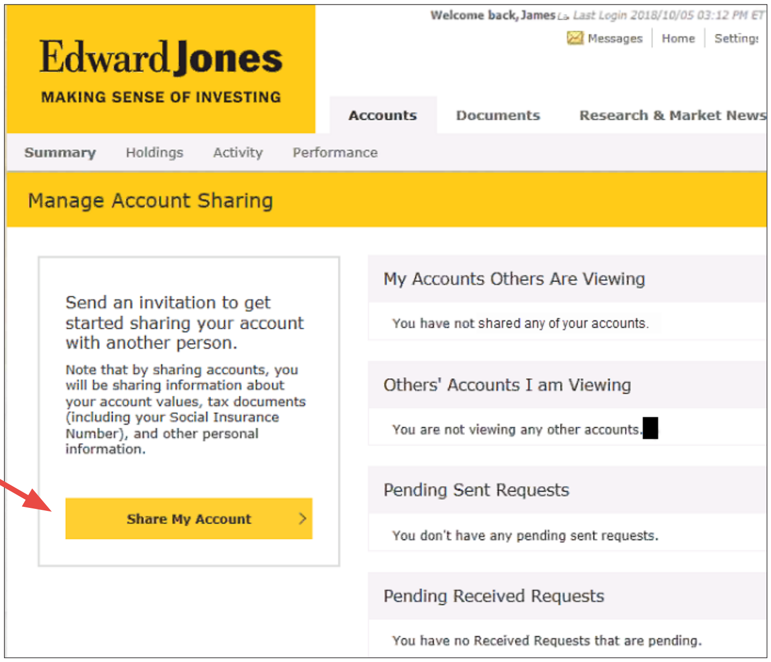


Step 4:

From this screen, you can see all your account sharing activity:

- Accounts others are viewing
- Others' accounts you are viewing
- Pending requests to share your account or view accounts of others

Click **Share My Account.**



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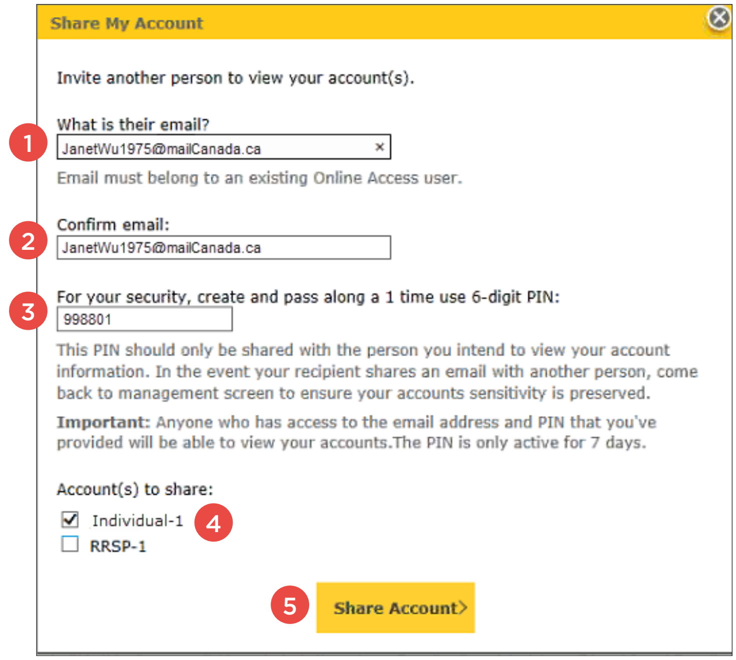
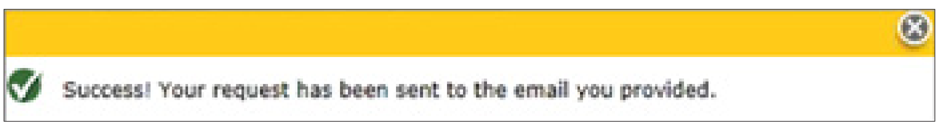
Step 5:

1. Enter the email address of the person you are inviting to view your account(s). Note: if the email address is linked to more than one account, all accounts will receive the request. Only the account holder with the 6-digit pin will be able to view your accounts.
2. Confirm the email address.
3. Create a six-digit, one time PIN number for security purposes.
4. Select the account(s) to share.
5. Click Share Account.



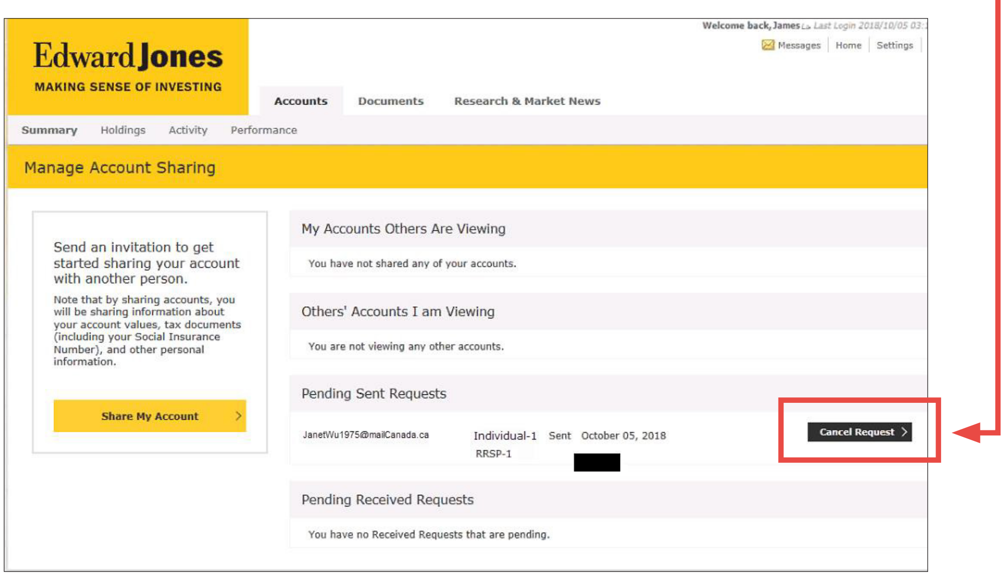


- The success message will display.

Step 6:

Your invite will remain in pending status for 7 days or until the other user logs in and inputs the 6-digit PIN - completing the account sharing process.

You can cancel the request at any time by clicking **Cancel Request.**



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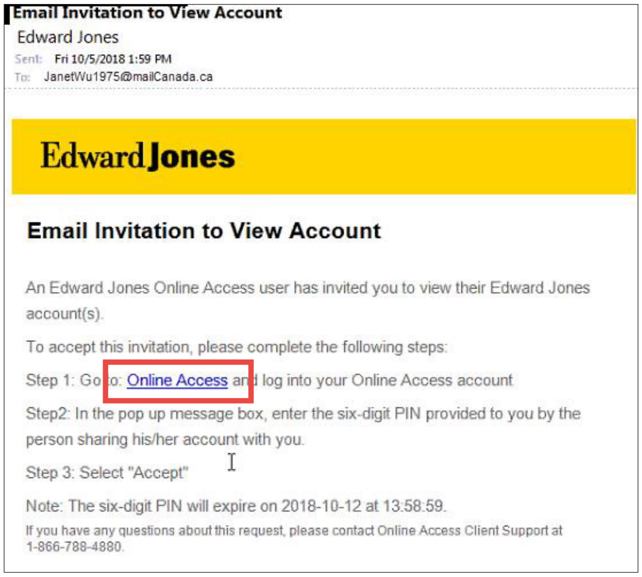
Step 7:

The person with whom you intend to share the account with will receive this email.

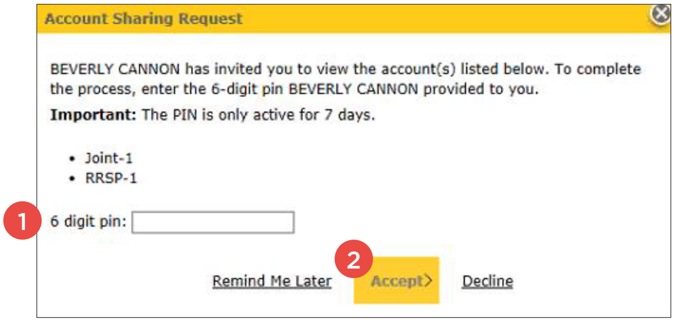
As you can see from the email, **the PIN is not included. You will have to verbally give the person the code.** This is an extra layer of security.

To accept the invitation to view the shared account, the person must:

- Login to **Online Access.**

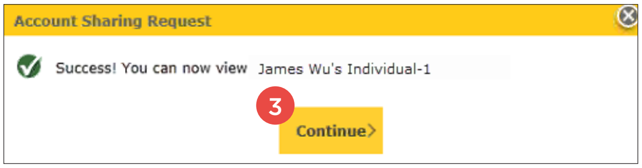


1. Enter the six-digit **PIN.**
2. Click **Accept** before the PIN expires as listed in the email.



- The Success message displays.

3. Click **Continue.**



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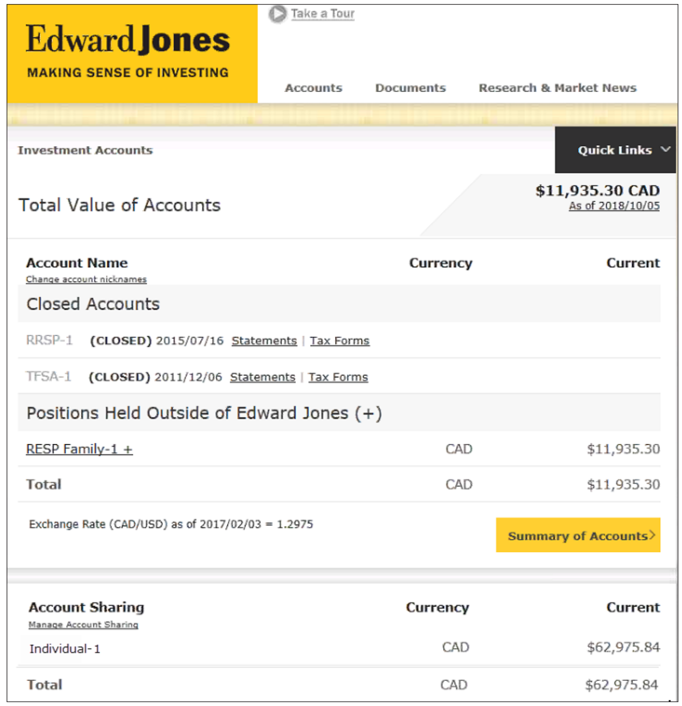
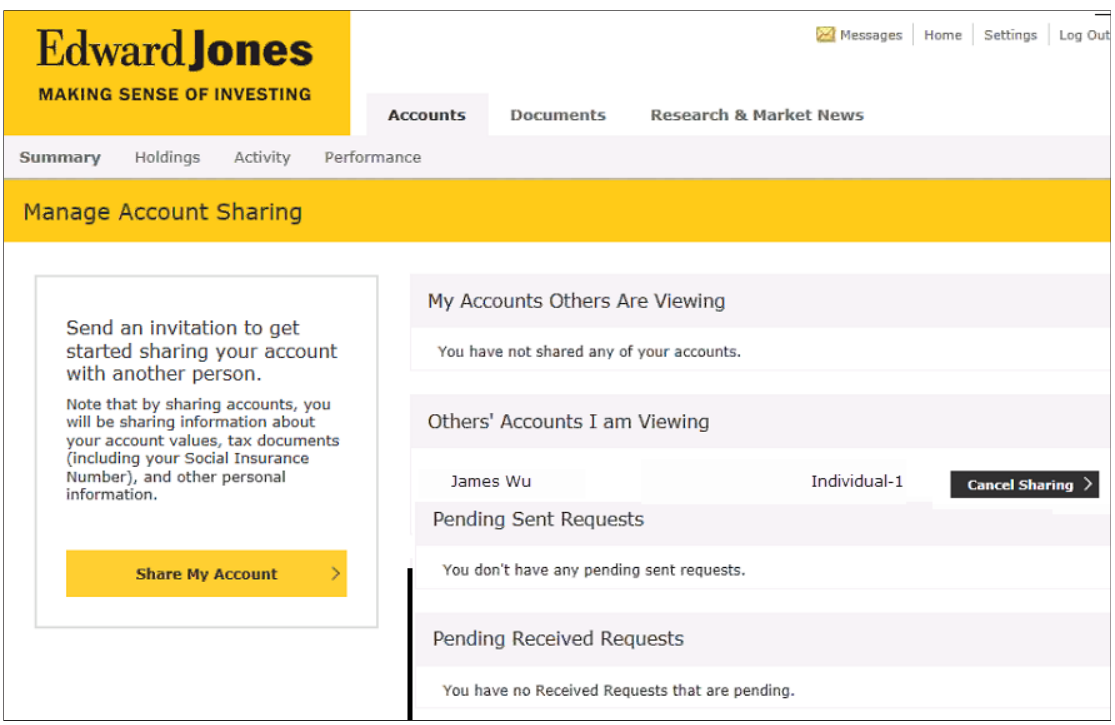
Once the other person completes the request, you will then see shared accounts on your Investment Accounts page under Account Sharing.



The recipient can go to his or her Account Sharing Summary and cancel viewing account by clicking **Cancel Sharing** under the **Others' Accounts I am Viewing** header.

You have the same option to cancel the viewing access except your **Cancel Sharing** button will be listed under the My Accounts Others are Viewing header.



If you encounter any issues during this process, please contact Online Client Support at 1-866-788-4880 or your branch.

