

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.

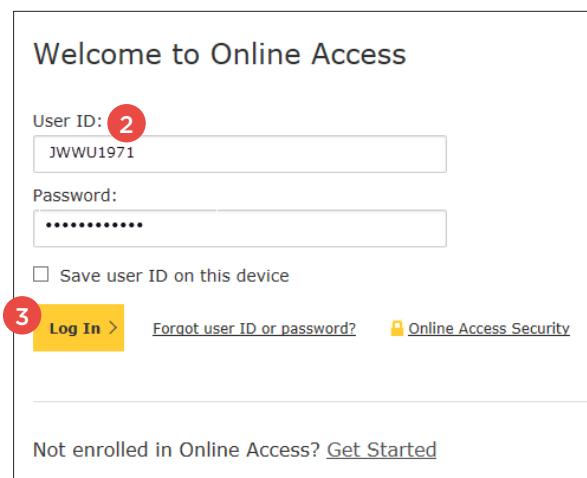
Step 1:

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.

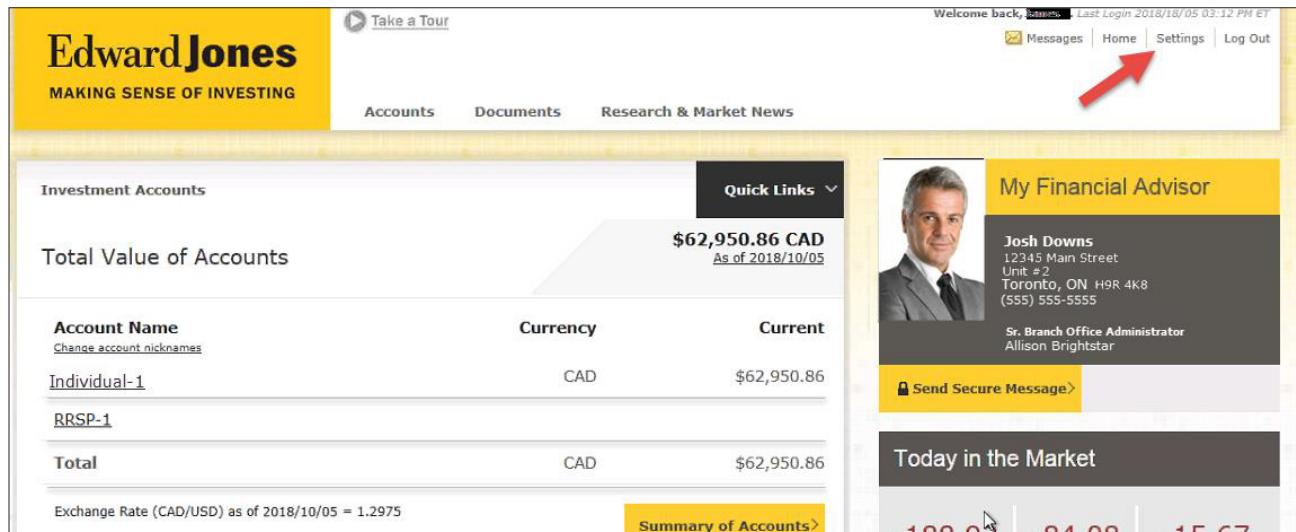


1. Click **Account Login**.
2. Enter **User ID** and **Password**.
3. Click **Log In >**.



Step 2:

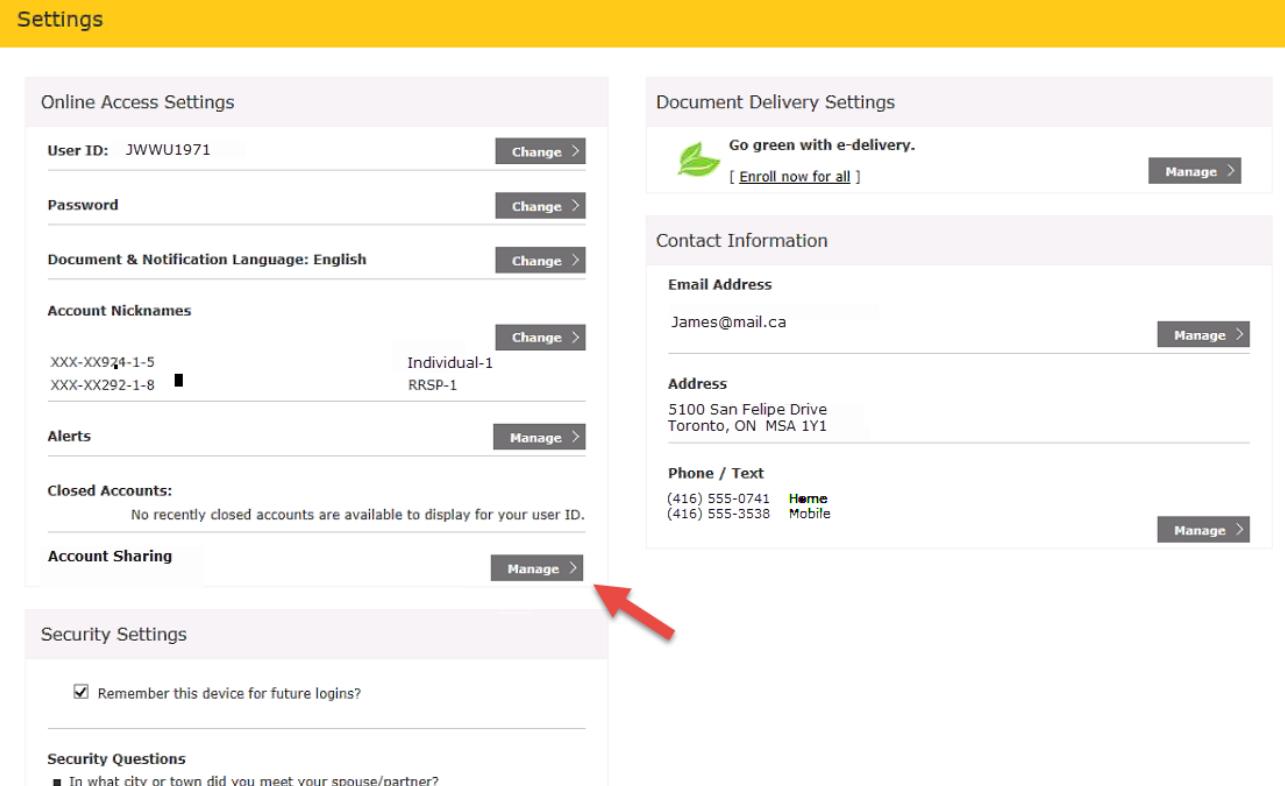
- Click **Settings**.



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Step 3:

Locate Account Sharing and click **Manage**.



The screenshot shows the 'Settings' page with a yellow header. The 'Account Sharing' section is highlighted with a red arrow pointing to the 'Manage' button. The 'Manage' button is located in the 'Account Sharing' section, which is the third item in the list of settings.

Online Access Settings

- User ID: JWWU1971 [Change >](#)
- Password [Change >](#)
- Document & Notification Language: English [Change >](#)
- Account Nicknames [Change >](#)
- XXX-XX974-1-5 Individual-1
- XXX-XX292-1-8 RRSP-1
- Alerts [Manage >](#)
- Closed Accounts: No recently closed accounts are available to display for your user ID.
- Account Sharing [Manage >](#)

Security Settings

- Remember this device for future logins?
- Security Questions [In what city or town did you meet your spouse/partner? >](#)

Document Delivery Settings

- Go green with e-delivery. [Enroll now for all >](#) [Manage >](#)

Contact Information

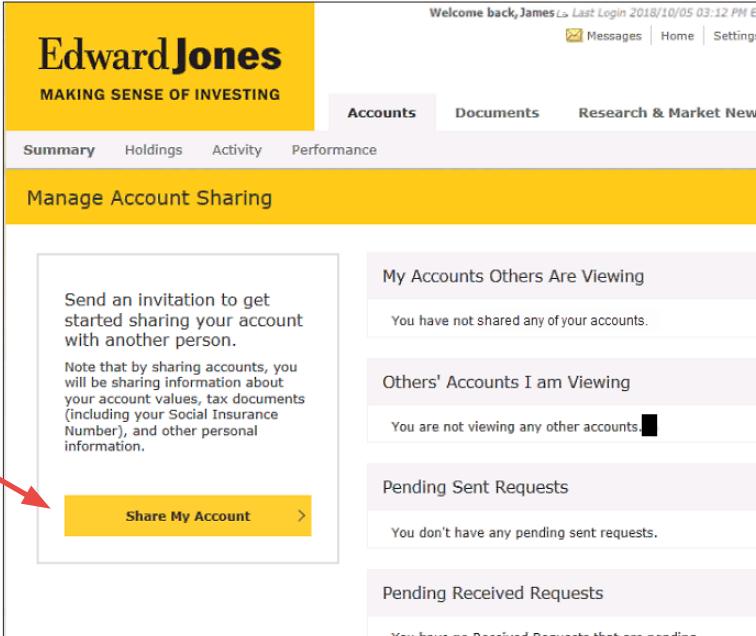
- Email Address James@mail.ca [Manage >](#)
- Address 5100 San Felipe Drive Toronto, ON M8A 1Y1
- Phone / Text (416) 555-0741 [Home >](#) (416) 555-3538 [Mobile >](#) [Manage >](#)

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.**



The screenshot shows the 'Manage Account Sharing' page. A red arrow points to the 'Share My Account' button, which is highlighted with a yellow box. The page includes sections for 'My Accounts Others Are Viewing', 'Others' Accounts I am Viewing', 'Pending Sent Requests', and 'Pending Received Requests'.

Welcome back, James Last Login 2018/10/05 03:12 PM ET

Edward Jones MAKING SENSE OF INVESTING

Accounts Documents Research & Market News

Summary Holdings Activity Performance

Manage Account Sharing

Send an invitation to get started sharing your account with another person.

Note that by sharing accounts, you will be sharing information about your account values, tax documents (including your Social Insurance Number), and other personal information.

Share My Account >

My Accounts Others Are Viewing
You have not shared any of your accounts.

Others' Accounts I am Viewing
You are not viewing any other accounts.

Pending Sent Requests
You don't have any pending sent requests.

Pending Received Requests
You have no Received Requests that are pending.

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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.

Share My Account

Invite another person to view your account(s).

1 What is their email?
JanetWu1975@mailCanada.ca

Email must belong to an existing Online Access user.

2 Confirm email:
JanetWu1975@mailCanada.ca

3 For your security, create and pass along a 1 time use 6-digit PIN:
998801

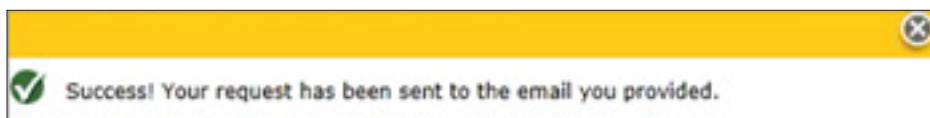
This PIN should only be shared with the person you intend to view your account information. In the event your recipient shares an email with another person, come back to management screen to ensure your accounts sensitivity is preserved.

Important: Anyone who has access to the email address and PIN that you've provided will be able to view your accounts. The PIN is only active for 7 days.

Account(s) to share:

Individual-1 **4**
 RRSP-1

5 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**.

Welcome back, James. Last Login 2018/10/05 03:23

Messages | Home | Settings

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Accounts Documents Research & Market News

Summary Holdings Activity Performance

Manage Account Sharing

Send an invitation to get started sharing your account with another person. Note that by sharing accounts, you will be sharing information about your account values, tax documents (including your Social Insurance Number), and other personal information.

Share My Account >

My Accounts Others Are Viewing
You have not shared any of your accounts.

Others' Accounts I am Viewing
You are not viewing any other accounts.

Pending Sent Requests
JanetWu1975@mailCanada.ca Individual-1 Sent October 05, 2018 **Cancel Request >**

Pending Received Requests
You have no Received Requests that are pending.

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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**.

Email Invitation to View Account

Edward Jones
Sent: Fri 10/5/2018 1:59 PM
To: JanetWu1975@mailCanada.ca

Edward Jones

Email Invitation to View Account

An Edward Jones Online Access user has invited you to view their Edward Jones account(s).

To accept this invitation, please complete the following steps:

Step 1: Go to: [Online Access](#) and log into your Online Access account

Step 2: In the pop up message box, enter the six-digit PIN provided to you by the person sharing his/her account with you.

Step 3: Select "Accept" 

Note: The six-digit PIN will expire on 2018-10-12 at 13:58:59.

If you have any questions about this request, please contact Online Access Client Support at 1-866-788-4880.

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

Account Sharing Request

BEVERLY CANNON has invited you to view the account(s) listed below. To complete the process, enter the 6-digit pin BEVERLY CANNON provided to you.

Important: The PIN is only active for 7 days.

- Joint-1
- RRSP-1

1 6 digit pin:

2 [Remind Me Later](#) [Accept](#) [Decline](#)

- The Success message displays.
3. Click **Continue**.

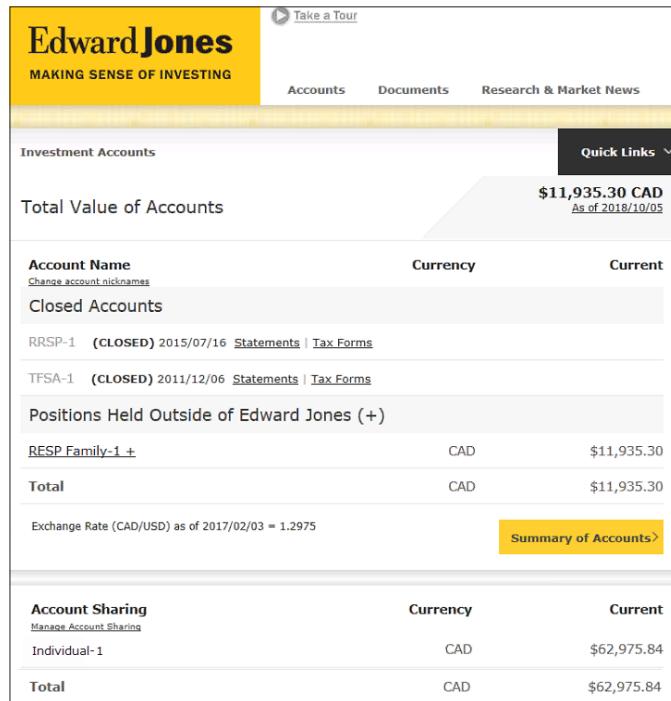
Account Sharing Request

✓ Success! You can now view James Wu's Individual-1

3 [Continue](#)

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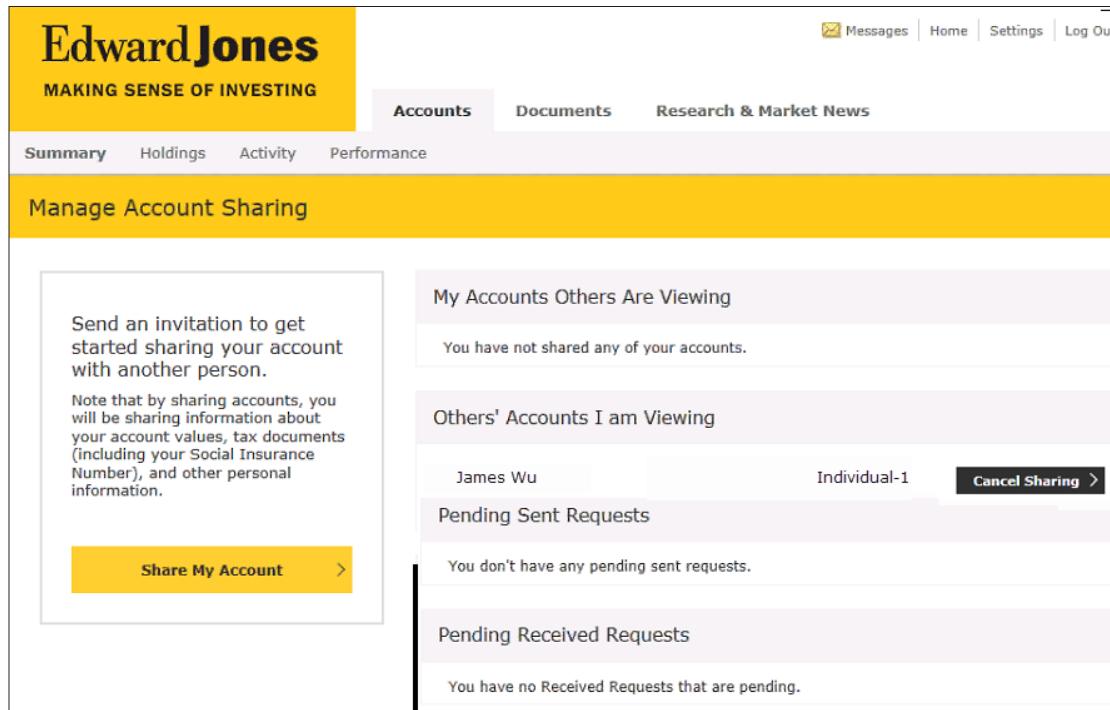
Once the other person completes the request, you will then see shared accounts on your Investment Accounts page under Account Sharing.



The screenshot shows the 'Investment Accounts' section of the Edward Jones Online Access interface. At the top, there is a yellow header with the Edward Jones logo and 'MAKING SENSE OF INVESTING'. Below this, a navigation bar includes 'Take a Tour', 'Accounts', 'Documents', and 'Research & Market News'. A 'Quick Links' dropdown is open, showing 'Total Value of Accounts' and '\$11,935.30 CAD As of 2018/10/05'. The main content area is titled 'Investment Accounts' and shows a table of accounts. The table has columns for 'Account Name', 'Currency', and 'Current'. It lists 'Closed Accounts' (RRSP-1, TFSA-1) and 'Positions Held Outside of Edward Jones (+)' (RESP Family-1). A summary table at the bottom shows 'Account Sharing' (Manage Account Sharing) with a total of '\$62,975.84'. A 'Summary of Accounts >' button is located in the bottom right corner of this section.

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.



The screenshot shows the 'Manage Account Sharing' page. The top navigation bar includes 'Messages', 'Home', 'Settings', and 'Log Out'. Below this, a secondary navigation bar has tabs for 'Summary', 'Holdings', 'Activity', and 'Performance', with 'Summary' currently selected. The main content area is titled 'Manage Account Sharing' and contains several sections: 'My Accounts Others Are Viewing' (You have not shared any of your accounts), 'Others' Accounts I am Viewing' (listing 'James Wu' with 'Individual-1' and a 'Cancel Sharing >' button), 'Pending Sent Requests' (You don't have any pending sent requests), and 'Pending Received Requests' (You have no Received Requests that are pending). A large yellow button on the left says 'Share My Account >'.

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