

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 >**.

The image shows the "Welcome to Online Access" login form. It includes fields for "User ID" (containing "JWWU1971") and "Password" (masked with dots). Below these fields is a checkbox for "Save user ID on this device". A red circle with the number "2" is next to the User ID field. At the bottom, there is a red circle with the number "3" next to the "Log In >" button. Other links include "Forgot user ID or password?" and "Online Access Security". At the very bottom, it says "Not enrolled in Online Access? Get Started".

Step 2:

- Click **Settings**.

The image shows the main dashboard of the Edward Jones Online Access portal. At the top, there is a navigation bar with "Accounts", "Documents", and "Research & Market News". A red arrow points to the "Settings" link in the top right corner. The main content area is divided into two columns. The left column shows "Investment Accounts" with a "Total Value of Accounts" of "\$62,950.86 CAD As of 2018/10/05". Below this is a table with columns "Account Name", "Currency", and "Current". The table lists "Individual-1" and "RRSP-1" under "Individual-1", and a "Total" row. The right column features a "My Financial Advisor" section with a photo of Josh Downs and his contact information, and a "Send Secure Message" button. Below that is a "Today in the Market" section with a table of market data.

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Step 3:

Locate Account Sharing and click **Manage**.

The screenshot shows the 'Settings' page with a yellow header. The left sidebar contains sections for 'Online Access Settings', 'Security Settings', and 'Closed Accounts'. The 'Online Access Settings' section includes fields for 'User ID', 'Password', 'Document & Notification Language', 'Account Nicknames', 'Alerts', and 'Account Sharing'. A red arrow points to the 'Manage' button next to 'Account Sharing'. The right sidebar contains 'Document Delivery Settings' and 'Contact Information'.

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 M5A 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. The left sidebar has tabs for 'Summary', 'Holdings', 'Activity', and 'Performance'. The main content area has a yellow header 'Manage Account Sharing'. It includes a section for sending invitations to share accounts, a note about sharing information, and a 'Share My Account' button. The right sidebar shows sections for 'My Accounts Others Are Viewing', 'Others' Accounts I am Viewing', 'Pending Sent Requests', and 'Pending Received Requests'.

Edward Jones
MAKING SENSE OF INVESTING

Welcome back, James L. Last Login 2018/10/05 03:12 PM ET
[Messages](#) | [Home](#) | [Settings](#)

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**

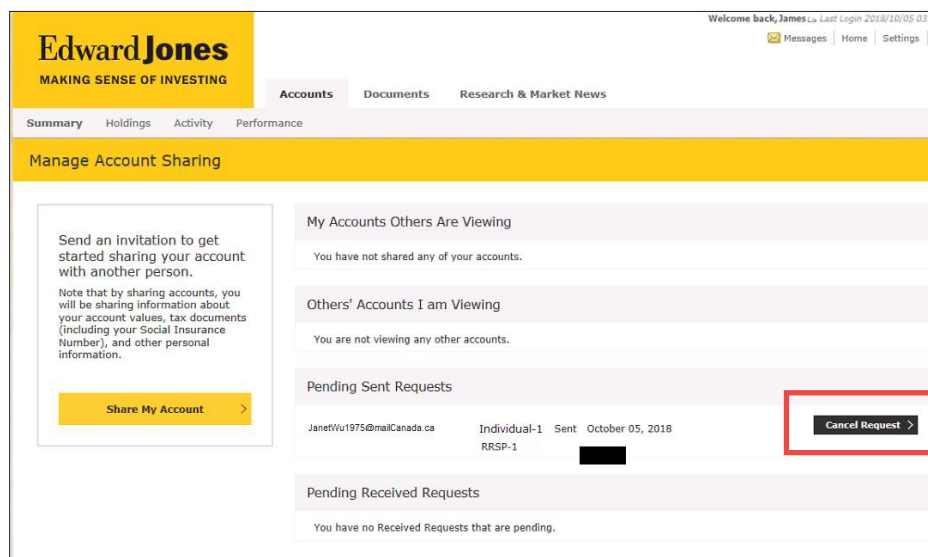


- The success message will display.

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**.



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Step 7:

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

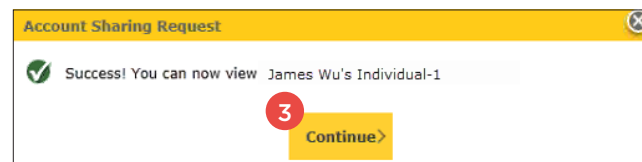
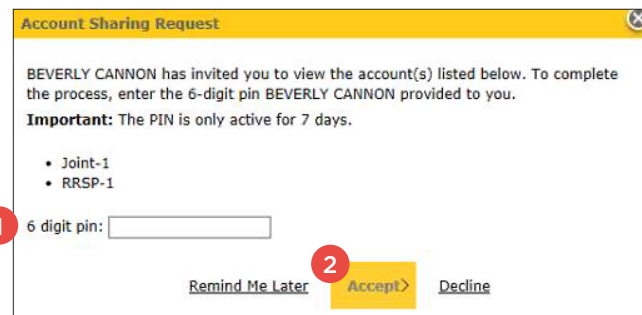
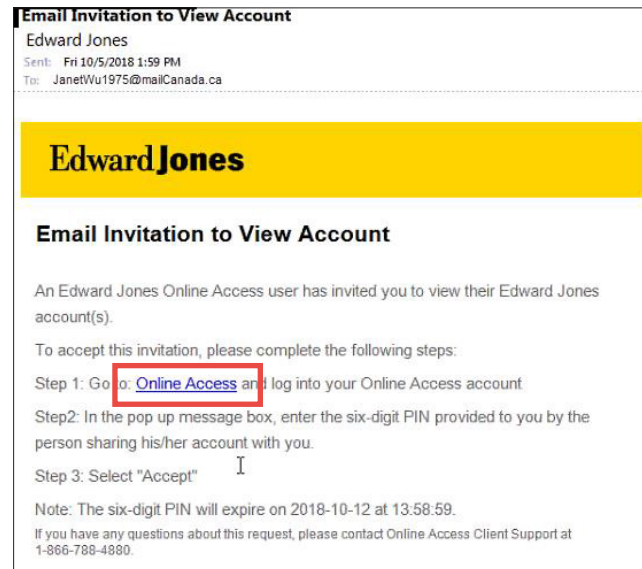
As you can see from the email, **the PIN is not included. You will have to verbally give the person the code.** This is an extra layer of security.

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

- Login to **Online Access**.

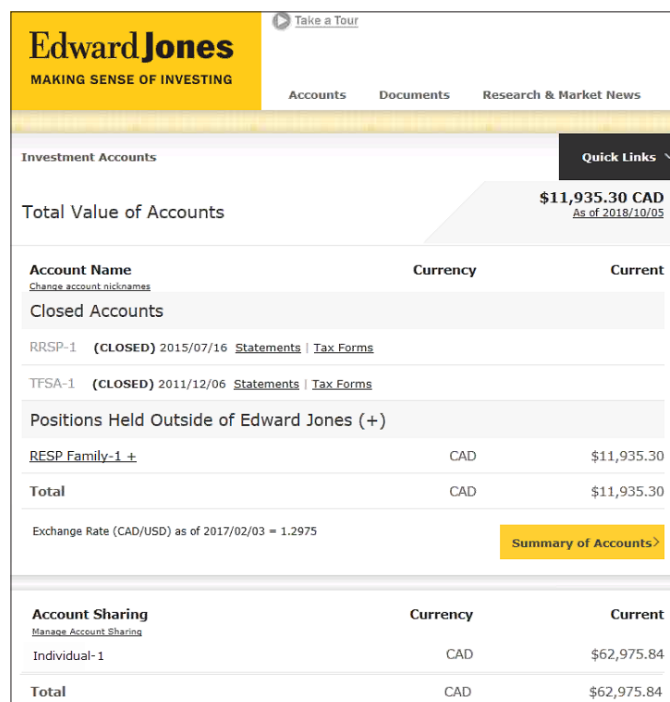
1. Enter the six-digit **PIN**.
2. Click **Accept** before the PIN expires as listed in the email.

- 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.



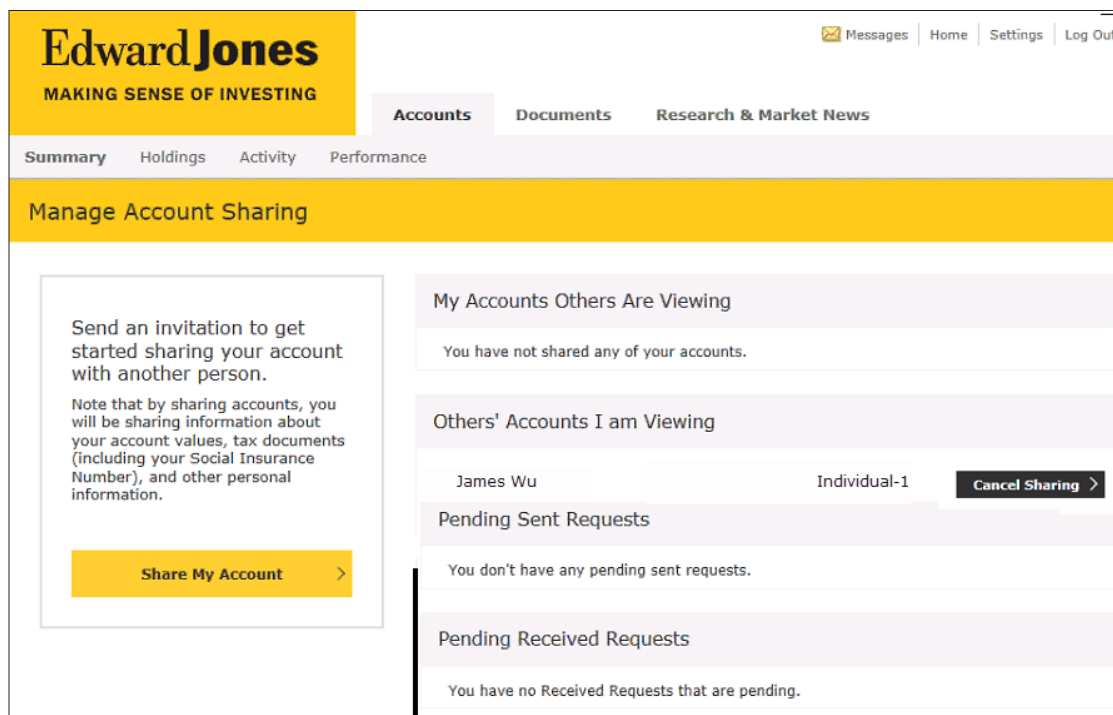
The screenshot shows the Edward Jones 'Investment Accounts' page. At the top, the logo and navigation tabs (Accounts, Documents, Research & Market News) are visible. The 'Total Value of Accounts' is \$11,935.30 CAD as of 2018/10/05. Below this, there are sections for 'Closed Accounts' (RRSP-1 and TFSA-1) and 'Positions Held Outside of Edward Jones (+)'. The 'Account Sharing' section at the bottom shows 'Individual-1' with a current value of \$62,975.84 CAD. A 'Summary of Accounts' button is located at the bottom right of the main table.

Account Name	Currency	Current
Closed Accounts		
RRSP-1 (CLOSED) 2015/07/16		Statements Tax Forms
TFSA-1 (CLOSED) 2011/12/06		Statements Tax Forms
Positions Held Outside of Edward Jones (+)		
RESP Family-1 +	CAD	\$11,935.30
Total	CAD	\$11,935.30
Exchange Rate (CAD/USD) as of 2017/02/03 = 1.2975		
Summary of Accounts		

Account Sharing	Currency	Current
Individual-1	CAD	\$62,975.84
Total	CAD	\$62,975.84

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. On the left, there is a 'Share My Account' button. The main content area is divided into three sections: 'My Accounts Others Are Viewing' (empty), 'Others' Accounts I am Viewing' (showing 'James Wu' with a 'Cancel Sharing' button), and 'Pending Sent Requests' (empty). The 'Pending Received Requests' section is also empty.

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

James Wu	Individual-1	Cancel Sharing
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Pending Sent Requests

You don't have any pending sent requests.

Pending Received Requests

You have no Received Requests that are pending.

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