

# 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. Click a topic below for detailed, step-by-step instructions.

Signing Up .....	2
Logging In .....	7
Connecting Accounts .....	15
Text Messaging .....	19
Signing Documents .....	23
Mobile Check Deposit.....	29

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.

**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:

- Must be 6-20 characters
- Cannot contain spaces or special characters
- Cannot contain your account number or your Social Security 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.

The screenshot shows the 'Verify Your Identity' step of the sign-up process. It features the Edward Jones logo at the top, followed by the title 'Online Access Sign-Up' and the sub-header 'Verify Your Identity'. Below this is a progress indicator with five dots, the first of which is filled. The form contains three input fields: 'Account Number' (with a 'First 8 digits' label and a help icon), 'Date of Birth' (with a 'MM/DD/YYYY' label), and 'Social Security Number' (with a 'Last 4 digits' label). A blue 'Next' button is highlighted with a red box, and a grey callout box with an arrow points to it with the text 'Click "Next."'.

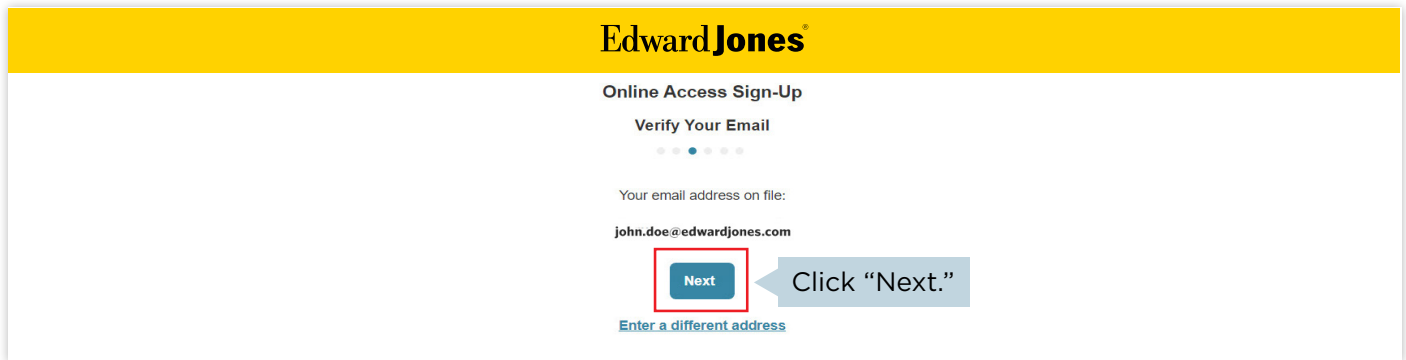
Create a user ID and password.

The screenshot shows the 'Create Your User ID & Password' step of the sign-up process. It features the Edward Jones logo at the top, followed by the title 'Online Access Sign-Up' and the sub-header 'Create Your User ID & Password'. Below this is a progress indicator with five dots, the second of which is filled. The form contains three input fields: 'User ID', 'Password' (with a 'Show Password' toggle), and 'Retype Your Password'. A blue 'Next' button is highlighted with a red box, and a grey callout box with an arrow points to it with the text 'Click "Next."'.

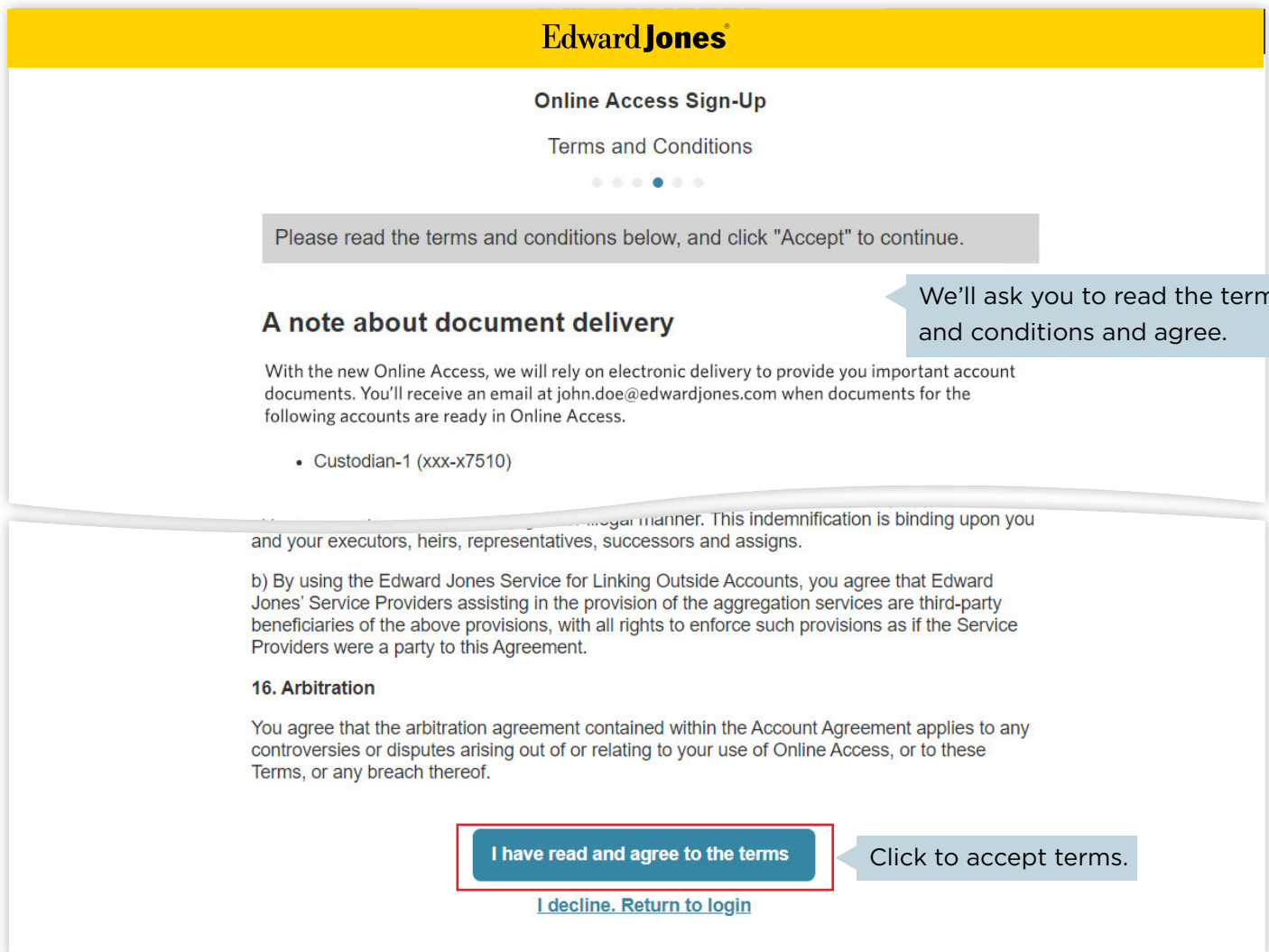
For assistance, call 800-441-5203  
Monday - Friday 7 a.m. - 9 p.m. CT | Saturday & Sunday 8 a.m. - 4 p.m. CT

# Signing 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.



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

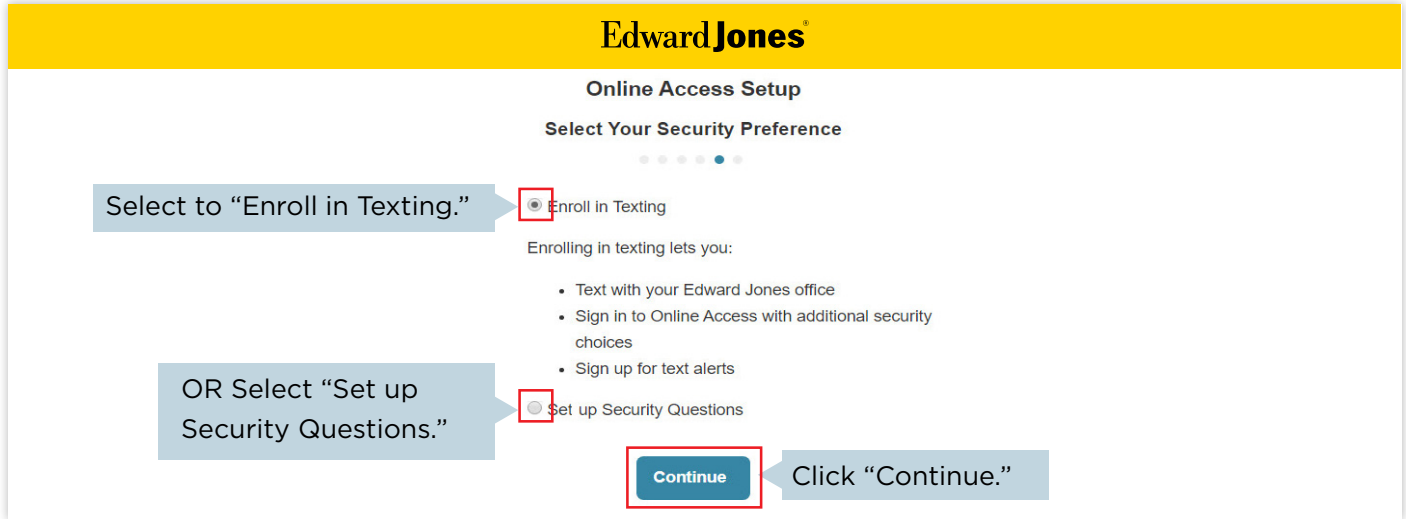


# Signing Up

## ▶ Step 3: Select your security preference.

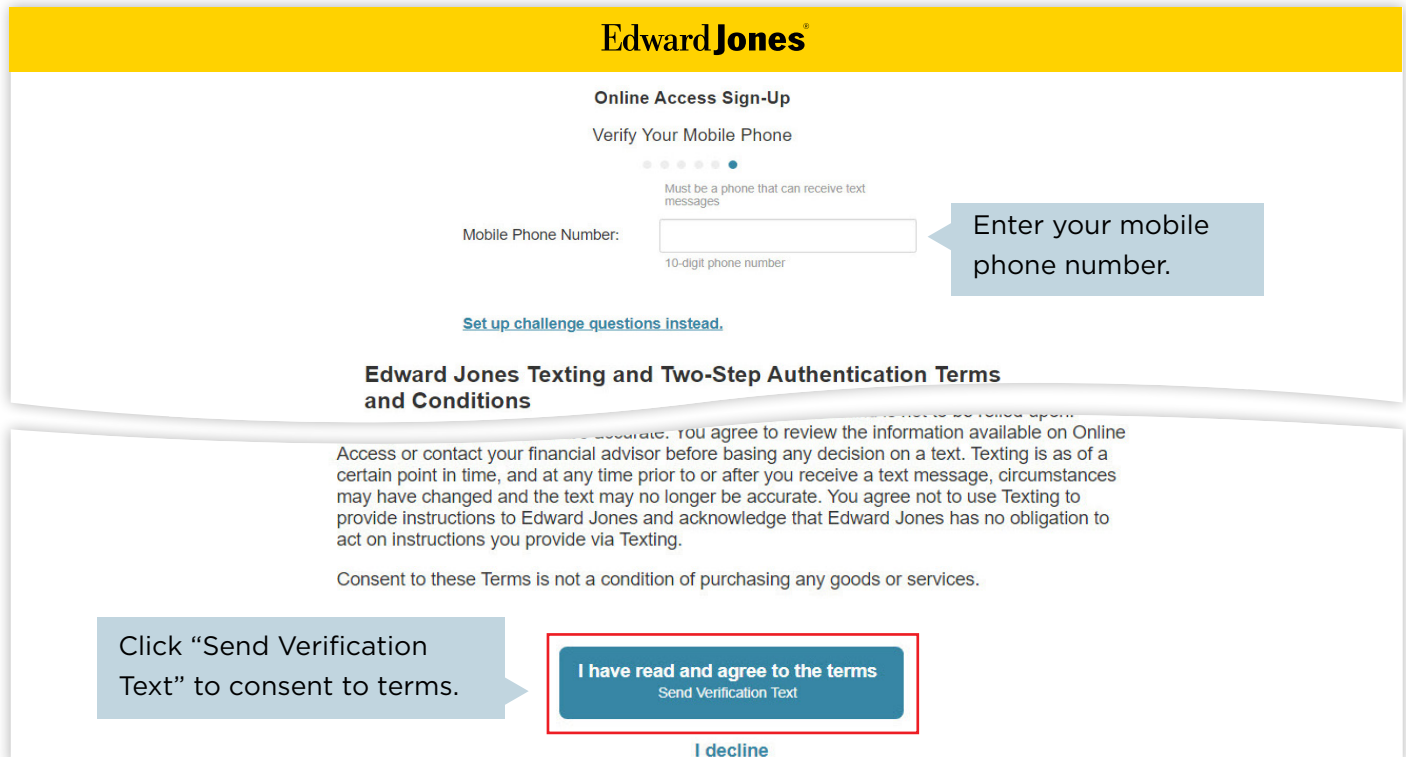
You can choose from two security options:

- a. Sign up for text messaging to receive a security code by text.
- b. Answer security questions.



### a. Sign up for text messaging.

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



# Signing Up

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

The screenshot shows the Edward Jones Online Access Sign-Up page. At the top, the Edward Jones logo is displayed. Below it, the heading "Online Access Sign-Up" is followed by "Verify Your Mobile Phone". A progress indicator shows five dots, with the fifth dot filled. A message states: "A verification code has been sent to 123-123-1231". Below this is a text input field labeled "Enter Verification Code:". At the bottom, a blue button labeled "Complete Verification" is highlighted with a red box. A callout box 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 Edward Jones Online Access Setup page. At the top, the Edward Jones logo is displayed. Below it, the heading "Online Access Setup" is followed by "Security Questions". A progress indicator shows five dots, with the fifth dot filled. There are three questions, each with a "Select One" dropdown menu and an "Enter your answer" text input field. At the bottom, a blue button labeled "Complete enrollment" is highlighted with a red box. A callout box points to this button with the text "Click 'Complete enrollment.'". Below the button is a blue link labeled "Back".

Once you've completed these steps, you should see a welcome screen that features a snapshot of your accounts.

# Logging In

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 8)

- 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 12)

### c. Email me a code (go to Page 13)

# Logging In

## *a. Text me a code.*

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

Select "Text me a code" and then "Continue."

The screenshot shows the Edward Jones login interface. At the top is the Edward Jones logo. Below it is a grey header with the text "Select Your Delivery Method". The main content area has the text "We'll need to confirm your identity before you can log in." followed by three radio button options: "Text me a code" (selected), "Call me with a code", and "Email me a code". Below the options is a blue "Continue" button. Red boxes highlight the selected radio button and the "Continue" button. Blue callout boxes with arrows point to these elements, containing the text "Select 'Text me a code.'" and "Click 'Continue' to receive your code." respectively.

**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-5550

Call me with a code

Email me a code

**Continue** Click "Continue" to receive your code.



# Logging In

We'll text a code to the verified mobile number we have on file. Simply enter it to continue.

The screenshot shows the Edward Jones mobile login interface. At the top is the Edward Jones logo. Below it is a grey header with the text "Enter Your Code". The main content area is white and contains a green notification box at the top stating "A code was sent to mobile phone number XXX-XXX-5550". Below this is the "Authentication Code:" label and an empty input field. A message follows: "Did you not receive a code? You can request a new code, select a new delivery option or call 800-441-5203 for assistance." Below this are two links: "Resend Code" and "Select New Delivery Option". The "Security Preference" section has two radio button options: "Remember my device." (which is selected) and "Don't remember my device." Below these is a note: "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.)" At the bottom is a blue "Log in" button. Three callout boxes with arrows point to specific elements: one points to the "Remember my device." radio button, another points to the "Log in" button, and a third points to the "Log in" button.

**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.

# Logging In

Select "Text me a code." 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-2025
  - XXX-XXX-1234 Select your preferred number.
  - XXX-XXX-6848

*i* Choose the number that will receive the text.
- Call me with a code
- Email me a code

Setup challenge questions in Settings once you've logged in to use this option in the future.

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

# Logging In

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**

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, you accept these Terms. These Terms are in addition to, and do not supersede, any agreement between you and Edward Jones, including, but not limited to, your Edward Jones Online Access Agreement.

**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 ask you to read the terms and conditions and agree.

Click to accept terms.

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

[Log in](#)

Choose if you'd like to remember your device.

Click "Log in" to complete your login.

# Logging In

## *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
- XXX-XXX-5550
- Email me a code

**Continue**

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.

Select "Call me with a code."

Select your preferred number.

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**

Choose if you'd like to remember your device.

Click "Log in" to complete your login.

# Logging In

*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
- Call me with a code
- Email me a code  
\*\*\*\*nda@ross.com

Select "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 \*\*\*\*nda@ross.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

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.**

What is your oldest child's nickname?

[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.

Choose if you'd like to remember your device.

# Connecting 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. The information will be shared with your financial advisor too.

Before you get started, compile your list of outside accounts and login information.

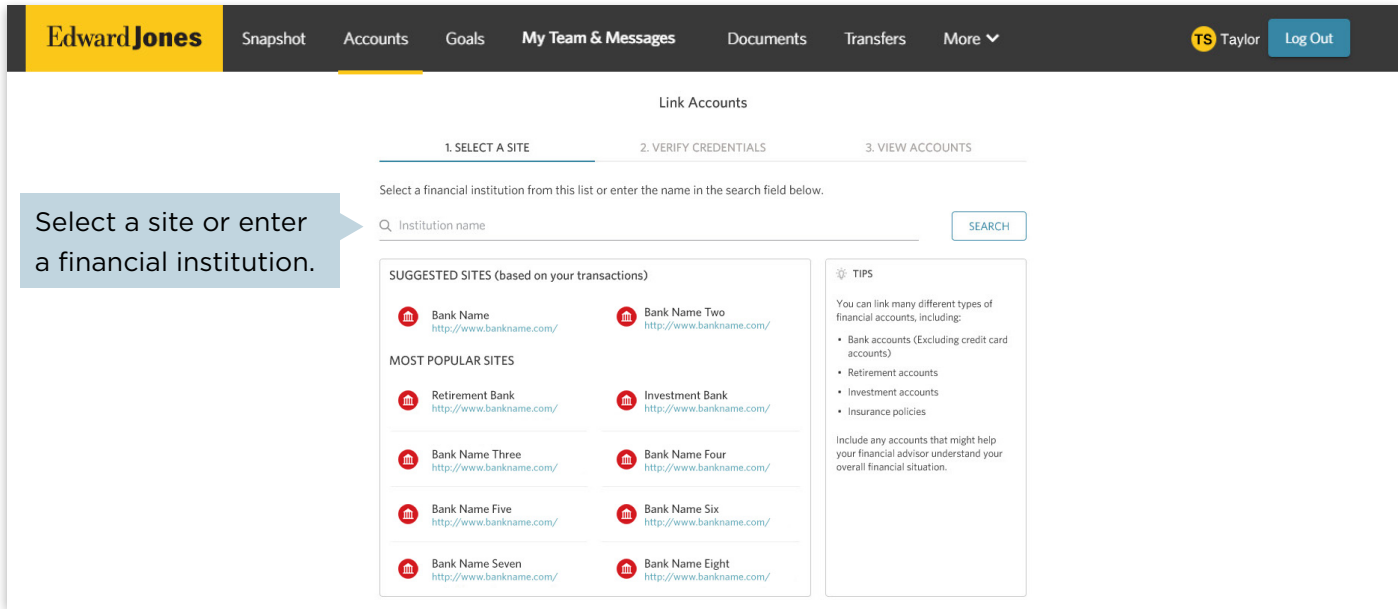
## ▶ Step 1: Log in to Online Access.

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

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

# Connecting 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)**

- Bank Name <http://www.bankname.com/>
- Bank Name Two <http://www.bankname.com/>

**MOST POPULAR SITES**

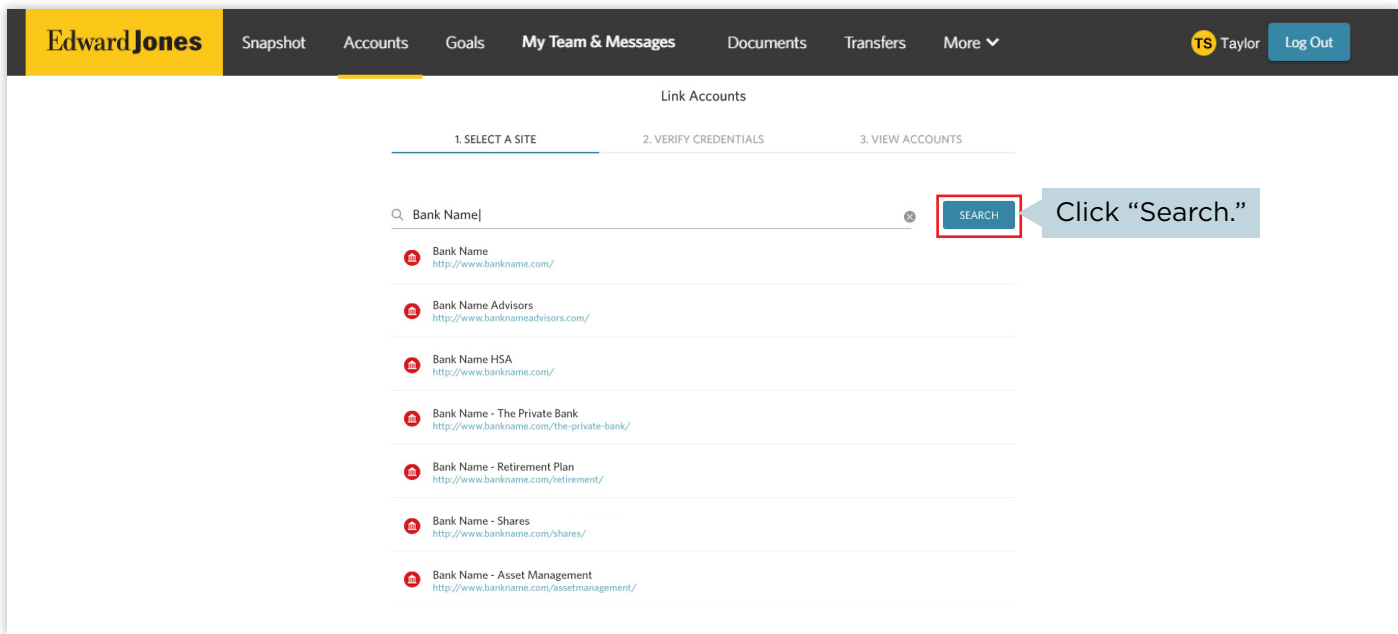
- Retirement Bank <http://www.bankname.com/>
- Investment Bank <http://www.bankname.com/>
- Bank Name Three <http://www.bankname.com/>
- Bank Name Four <http://www.bankname.com/>
- Bank Name Five <http://www.bankname.com/>
- Bank Name Six <http://www.bankname.com/>
- Bank Name Seven <http://www.bankname.com/>
- Bank Name Eight <http://www.bankname.com/>

**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.



**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 Bank Name| SEARCH

- Bank Name <http://www.bankname.com/>
- Bank Name Advisors <http://www.banknameadvisors.com/>
- Bank Name HSA <http://www.bankname.com/>
- Bank Name - The Private Bank <http://www.bankname.com/the-private-bank/>
- Bank Name - Retirement Plan <http://www.bankname.com/retirement/>
- Bank Name - Shares <http://www.bankname.com/shares/>
- Bank Name - Asset Management <http://www.bankname.com/assetmanagement/>



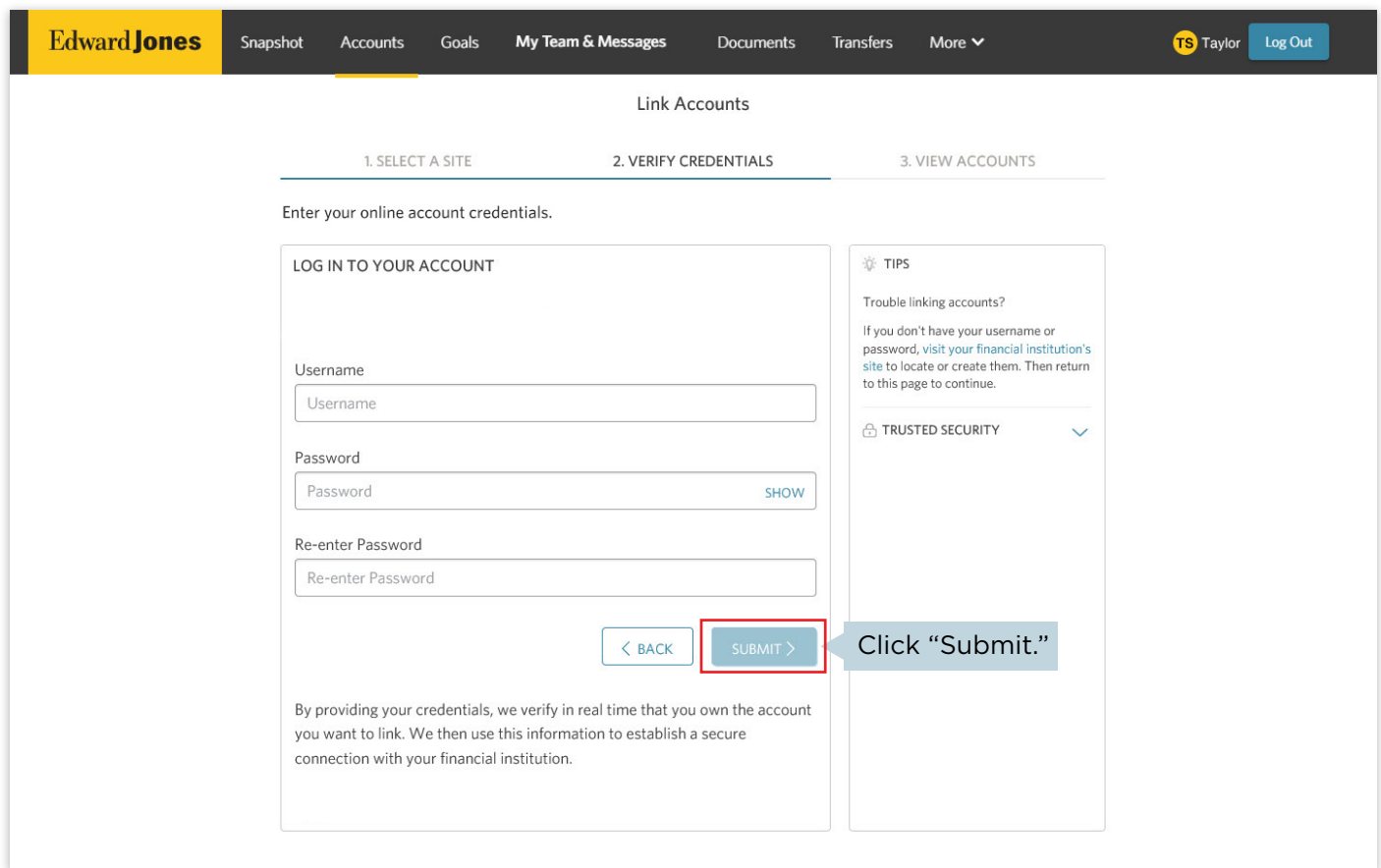
# Connecting Accounts

▶ **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 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.

The screenshot shows the 'Accounts' section of the Edward Jones online portal. At the top, there is a navigation bar with the Edward Jones logo and menu items: Snapshot, Accounts, Goals, My Team & Messages, Documents, Transfers, and More. A user profile for Taylor is visible with a 'Log Out' button. Below the navigation, the 'Accounts' section displays two values: Total Value (\$909,967.99) and Edward Jones Value (\$816,249.43). There is a 'Connect Accounts' button and an 'Account Actions' dropdown menu. The main content is divided into three sections: Investments, Insurance & Annuities, and Loans & Credits. Each section contains a table of account details.

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
INVESTMENT				\$79,629.00 1/22/2020 10:58 AM

Insurance & Annuities	Account #	Account Type	Goal	Value
LIFE INSURANCE	*****0568	Universal Life Insurance		\$49,202.35
INSURANCE				\$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

# 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."

# Text Messaging

▶ Step 2: Select your name/icon in the top header bar and then “Settings” in the drop-down menu.

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

## Settings

Change Stop/Start getting copies of documents by mail

Change

Change

**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 don't receive and enter a code each time you log in.)

**Contact Information**

**Email Address** [Manage](#)  
email-address@email.com

**Address** [Manage](#)  
123 Street  
City, ST 00000

**Phone / Text** [Manage](#)  
000-000-0000 Mobile

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

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

## Manage Phone / Text

**My Phone Numbers**

Click “Enroll in Texting.” Phone Number

Primary	Type	Number	
	Mobile	XXX-XXX-XXXX	<a href="#">Edit   Delete</a> <a href="#">Enroll in Texting</a>

# Text Messaging

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

Edward Jones
Snapshot
Accounts
Goals
My Team & Messages
Documents
Transfers
More ▾
TS Taylor
Log 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** [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, the financial products and other operational messages, and Edward Jones account services information or other marketing communications. Scroll to bottom.

**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.

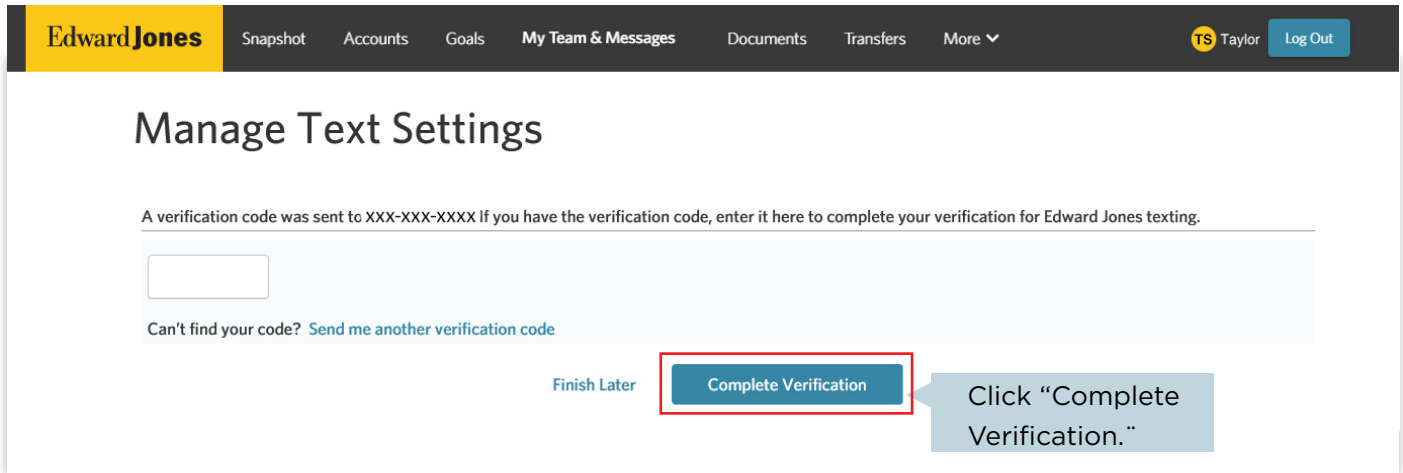
Click the box.
Keep my current settings

Send Verification Code

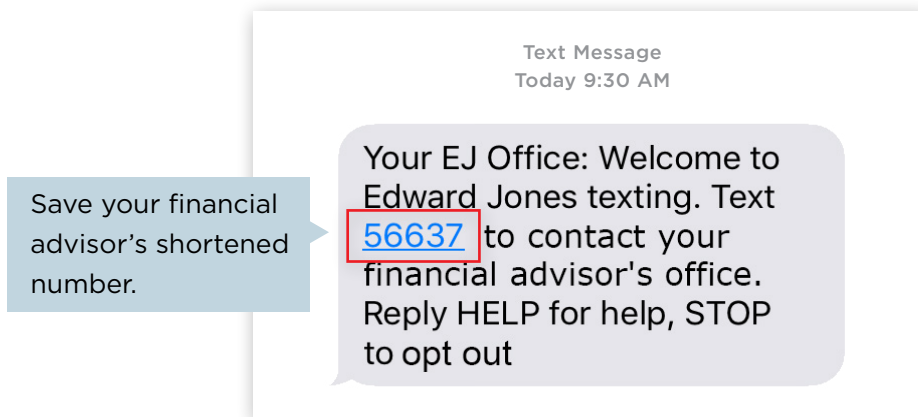
Click "Send Verification Code."

# Text Messaging

▶ Step 5: You'll receive a text with a verification code. Enter the code in Online Access. Then select "Complete Verification."



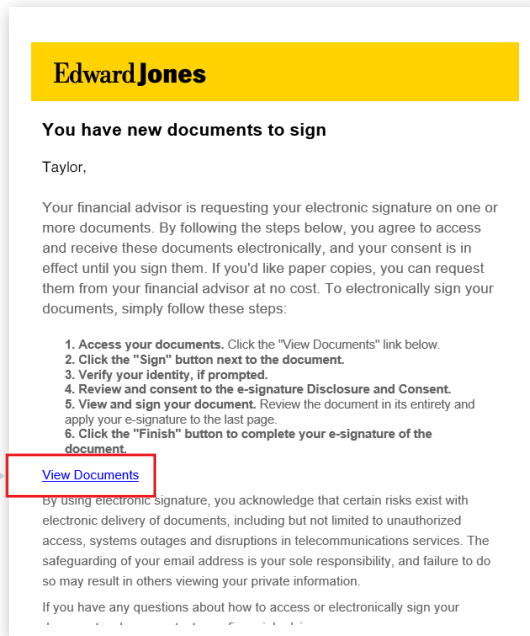
▶ Step 6: Once your information is verified, you'll receive a welcome text. Save the number to your phone contacts and use it to communicate with your Edward Jones team.



# Signing Documents

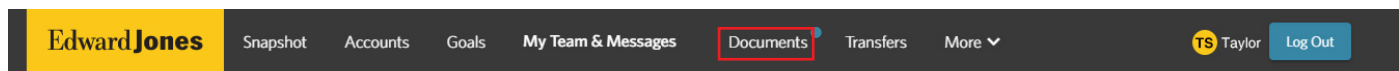
▶ **Step 1: You'll receive an email letting you know you have documents to sign. Select the link in the email.**

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.



Click "View Documents."

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



Click "Documents."

# Signing Documents

▶ 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 user interface. At the top, there is a navigation bar with the logo and menu items: Snapshot, Accounts, Goals, My Team & Messages, Documents (highlighted), Transfers, and More. On the right side of the navigation bar, there is a user profile for 'Taylor' with a 'Log Out' button. Below the navigation bar, the main heading is 'Documents'. A message states: '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 message is a section titled 'E-Signature'. Inside this section, there is a document entry for 'Individual/Joint Account Authorization' with a sub-entry 'Joint-1 • \*\*\*\*5750'. To the right of the document title, it says 'Posted 1/14/2020 | Expires 2/13/2020'. A button labeled 'Sign Document' with a document icon is highlighted with a red rectangular box. A callout bubble points to this button with the text 'Click "Sign Document."'.



# Signing Documents

## ▶ 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."

### 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](#)      Click to accept 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

# Signing Documents

## ▶ Step 4: Confirm your identity.

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

**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

# Signing Documents

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.



**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

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.

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

Enter the authentication code.

Click "Complete Verification."

## b. Identification Questions

If your document requires identification questions, you'll see the following screen. Answer the questions, then click "Next" to continue.



### 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

Click "Next."

Note: Edward Jones does not generate these questions, nor do we see or retain the selected answers.

# Signing Documents

▶ 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.

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**    
 Owner/Custodian/Guardian's Signature Social Security Number Date  
**John Doe**   
 Printed Owner/Custodian/Guardian's Name Email Address

Page 1 of 1  
Rev. March 2017

USSGLAUTHIRAZ2596688A17020600248-----

**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	↓

# Mobile Check Deposit

▶ Step 1: Grab your check.



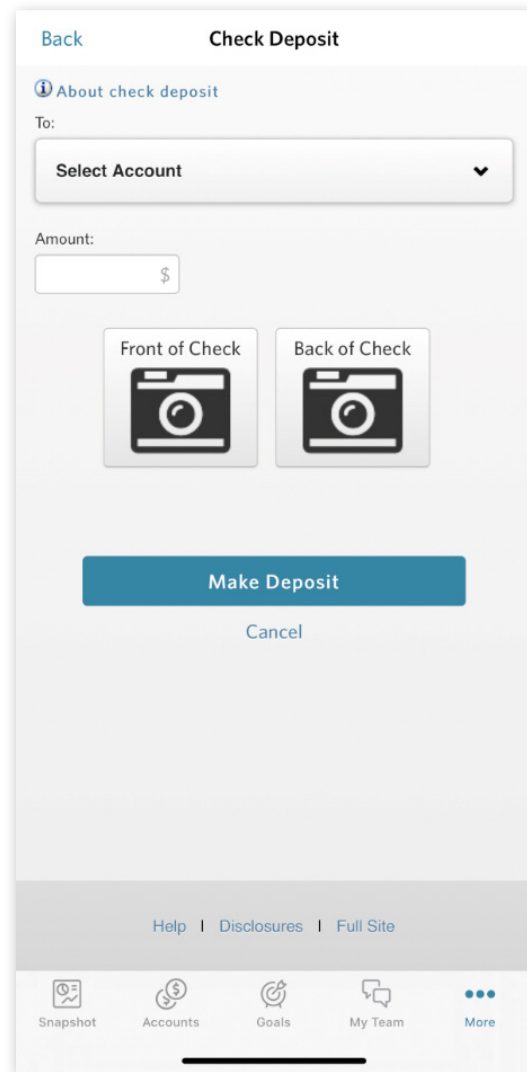
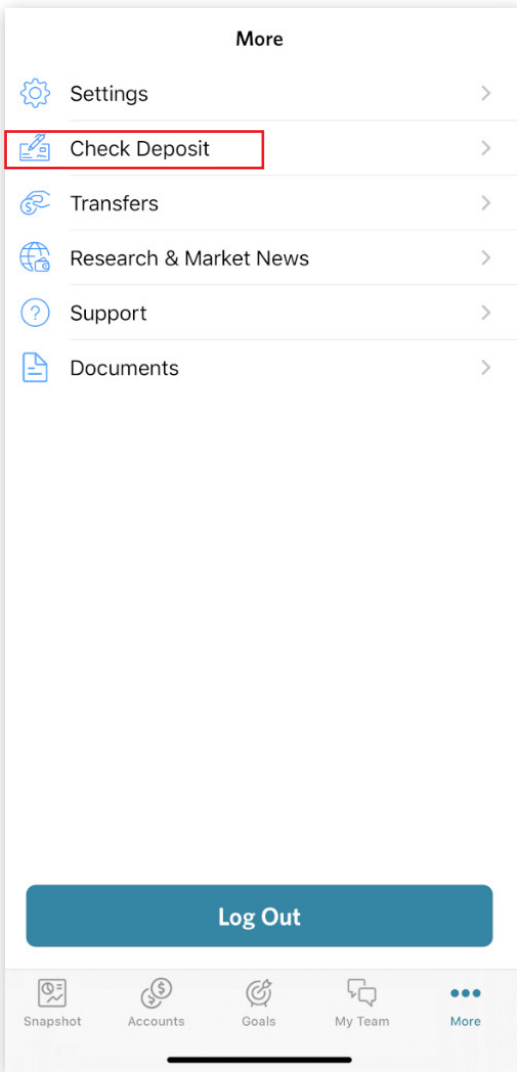
▶ Step 2: Open the Edward Jones mobile app from your smart phone or tablet.



# Mobile Check Deposit

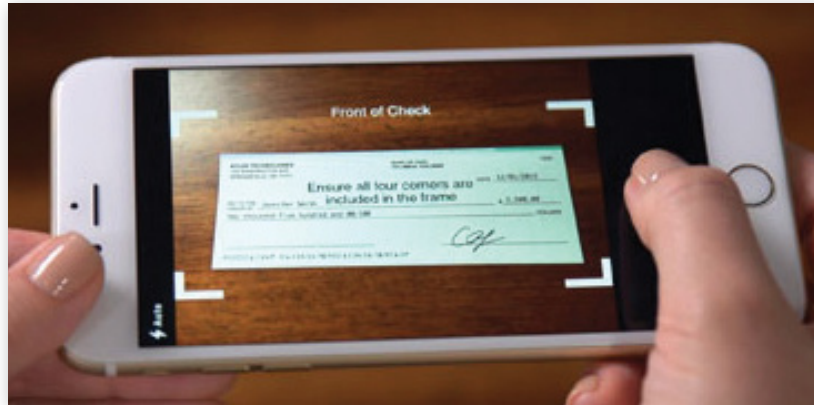
▶ Step 3: Open the app, log in and select “More” from the bottom navigation. Then select “Check Deposit” from the list.

▶ Step 4: Select your account and input the value of the check.

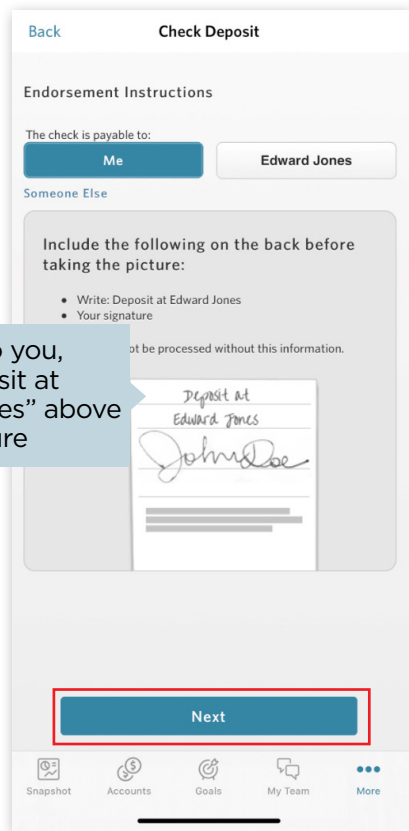


# Mobile Check Deposit

▶ Step 5: Take a photo of the front of your check.

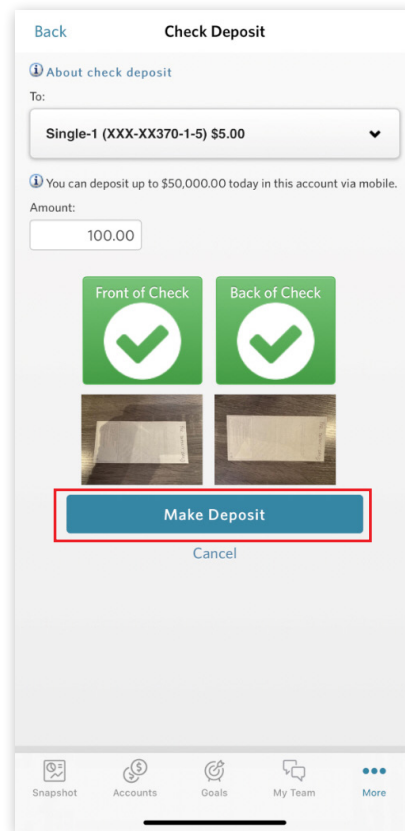


▶ Step 6: Take a photo of the back of your check and verify to whom the check is payable.



If payable to you, write "Deposit at Edward Jones" above your signature

▶ Step 7: Select "Make Deposit."



edwardjones.com Member SIPC

For additional assistance, visit [edwardjones.com/access](https://edwardjones.com/access) or call Online Client Support at 800-441-5203, Monday-Friday (7 a.m.-9 p.m. CT) or Saturday-Sunday (8 a.m.-4 p.m. CT).

