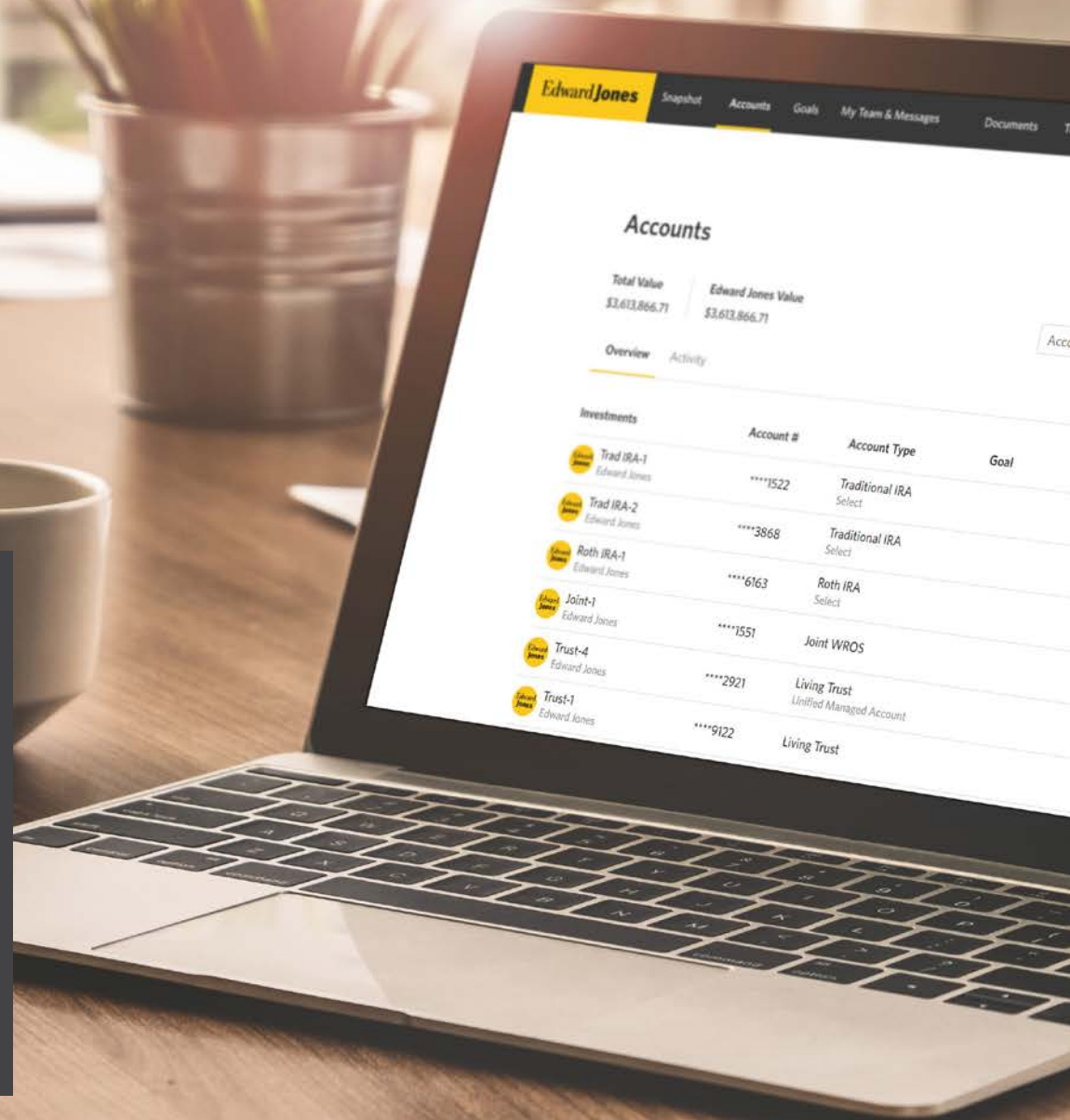


Edward Jones®

Online Access User Guide





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MOBILE DEPOSIT

Online Access

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.

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If you have any questions, please contact your Edward Jones team.



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MOBILE DEPOSIT

STEP 01

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 or using our mobile app, go to Page 4.

A. Your financial advisor emailed you an invitation.

1. Open the email and select the "Complete sign-up" link.
2. Complete the required fields and create a user ID and password.
3. Click "Next."

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:

2 **3**



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STEP 01

Sign up by invitation from your Edward Jones team or on your own (continued)

B. If you're signing up at edwardjones.com/access or using our mobile app:

1. Enter your account number, date of birth and last four digits of your Social Security number.
2. Click "Next."

3. Create a user ID and password.
4. Click "Next."

5. If you already have a verified email address on file with us, you'll be asked to confirm that it's correct.
6. 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.
7. Click "Next."



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MOBILE DEPOSIT

STEP 02

Terms and Conditions

A. Read the Terms and Conditions before agreeing to them.

1. Click to accept terms.



Online Access Sign-Up

Terms and Conditions

• • • • •

Please read the terms and conditions below, and click "Accept" to continue.

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 john.doe@edwardjones.com when documents for the following accounts are ready in Online Access.

- Custodian-1 (xxx-x7510)

My account information may be used in a negligent or illegal 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.

1

I have read and agree to the terms

[I decline. Return to login](#)



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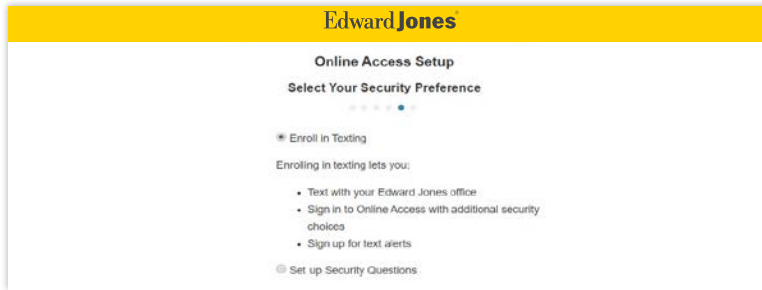


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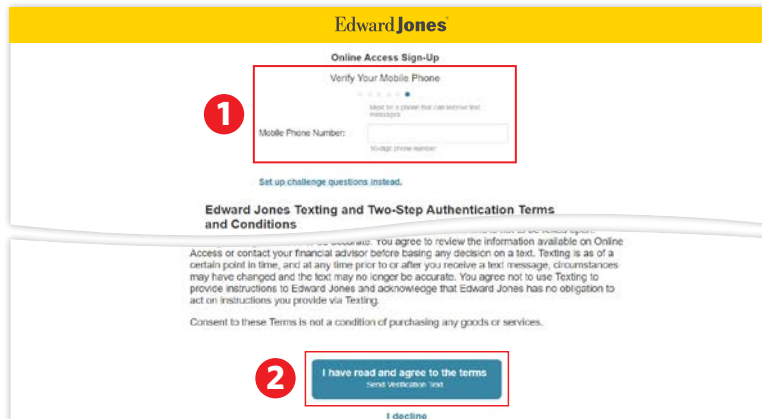
STEP 03

Select your security preference

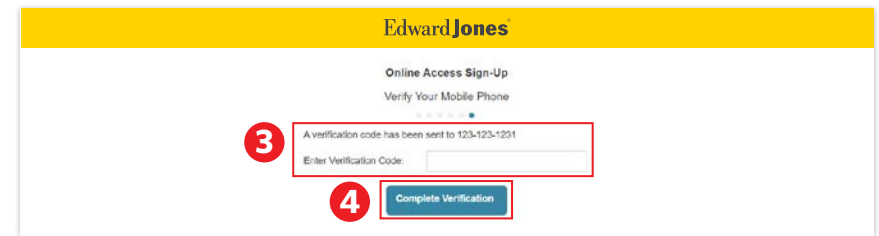
A. Sign up for text messaging.



1. Verify your mobile phone number.
2. Click "Send Verification Text" to consent to terms.



3. Enter the verification code you received by text.
4. Click "Complete Verification."



You can choose from two security options:

1. Sign up for text messaging
2. Answer security questions



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STEP 03

Select your security preference (continued)

B. Set up security questions.

1. Choose your security questions and answers.
2. Select "Complete enrollment."
3. Once you've completed these steps, you should see a welcome screen that features a snapshot of your accounts.

Edward Jones

Online Access Setup

Security Questions

Question 1
 Select One
 Enter your answer

Question 2
 Select One
 Enter your answer

Question 3
 Select One
 Enter your answer

Complete enrollment

[Back](#)



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STEP 01

Log in to Online Access at edwardjones.com/login

With two-step authentication, we'll send you a code to confirm your identity when you log in to Online Access.

Edward Jones

Welcome to Online Access

Save user ID on this device

[Find your user ID](#) | [Reset your password](#)

[Support](#) [Disclosures](#) [Privacy & Security Center](#)

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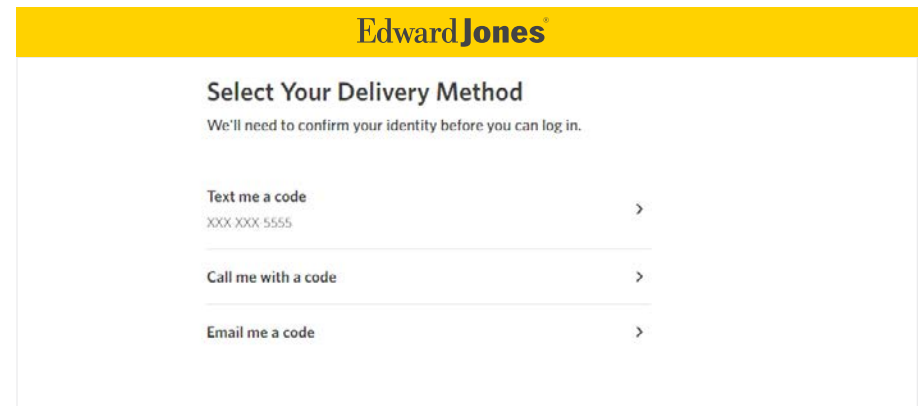
MOBILE DEPOSIT

STEP 02

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.

1. Text me a code (go to Page 10).
 - i. Already signed up for text messaging with Edward Jones
 - ii. Not signed up for text messaging with Edward Jones
2. Call me with a code (go to Page 13).
3. Email me a code (go to Page 14).





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MOBILE DEPOSIT

STEP 02

Select one of three options to receive your security code (continued)

Not signed up for text messaging with Edward Jones? Go to Page 11.

A. Text me a code.

1. Select "Text me a code."
2. We'll text a code to the verified mobile number we have on file. Simply enter it to continue.

3. Choose if you'd like to remember your device.
4. Click "Log In" to complete your login.



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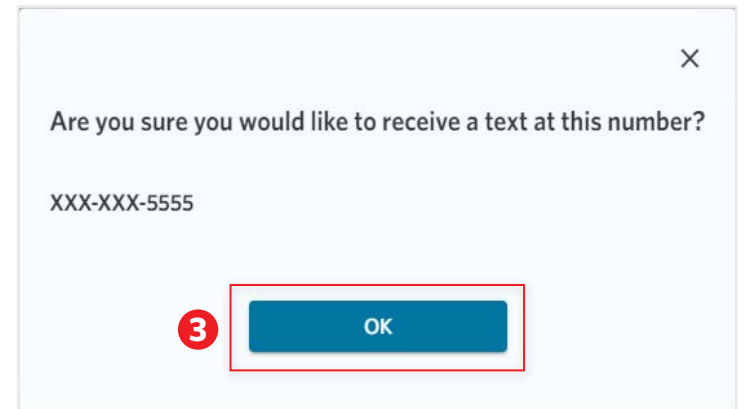
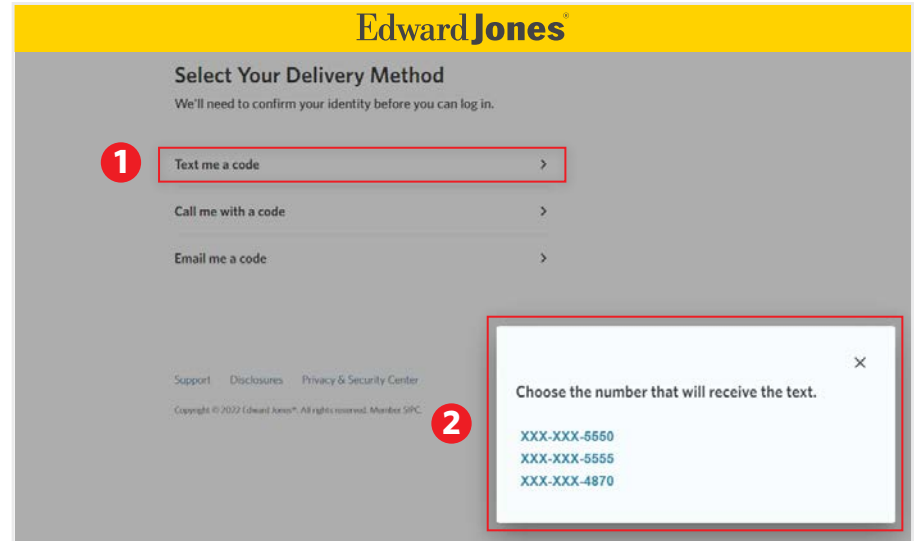
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STEP 02

Select one of three options to receive your security code (continued)

B. New users: Sign up for text messaging.

1. Select "Text me a code."
2. Then select the phone number you'd like to use to receive texts.
3. If you've chosen a number that isn't listed as "mobile" on your account, you'll see this pop-up. Click "OK."





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MOBILE DEPOSIT

STEP 02

Select one of three options to receive your security code (continued)

4. Read and accept the Terms and Conditions.

Edward Jones

Review Terms & 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.

[Download \(PDF\)](#)

Edward Jones Texting and Two-Step Authentication Terms and Conditions

These terms and conditions ("Terms") govern your sending of text to and receipt of texts from Edward Jones ("Texting"), which may include marketing communications and/or authentication codes to log into Edward Jones Online. It is your responsibility to ensure you are agreeing to these Terms, as well as by using Texting via text. These Terms are in addition to the Terms of Use.

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.

4

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

6. Choose if you'd like to remember your device.

7. Click "Log In" to complete your login.

Edward Jones

Enter Your Code

A six-digit code was sent to mobile phone XXX-XXX-5555.

5

6 Remember this device [?](#)

7

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](#)



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MOBILE DEPOSIT

STEP 02

Select one of three options to receive your security code (continued)

C. Call me with a code.

1. You'll receive an auto-dialed call containing your security code.
2. Select "Call me with a code."
3. Select your preferred number.
4. Enter the code.
5. Choose if you'd like to remember your device.
6. Click "Log In" to complete your login.

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 >

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Choose the number that will receive the text.

XXX-XXX-5550

XXX-XXX-5555

XXX-XXX-4870

Edward Jones[®]

Enter Your Code

A six-digit code was sent to mobile phone XXX-XXX-5555.

123456

Remember this device ?

Log In

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](#)



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STEP 02

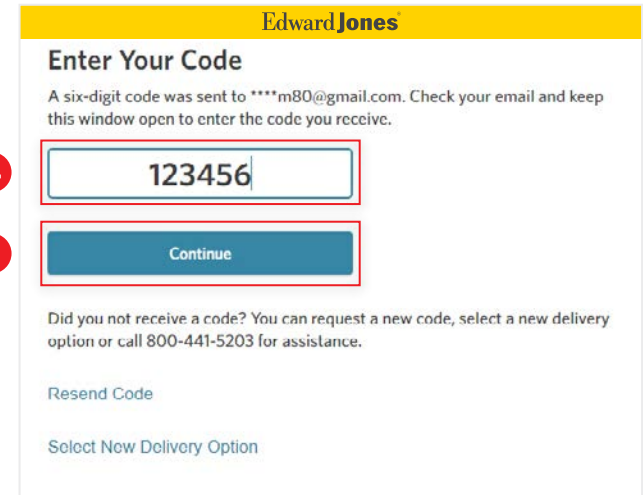
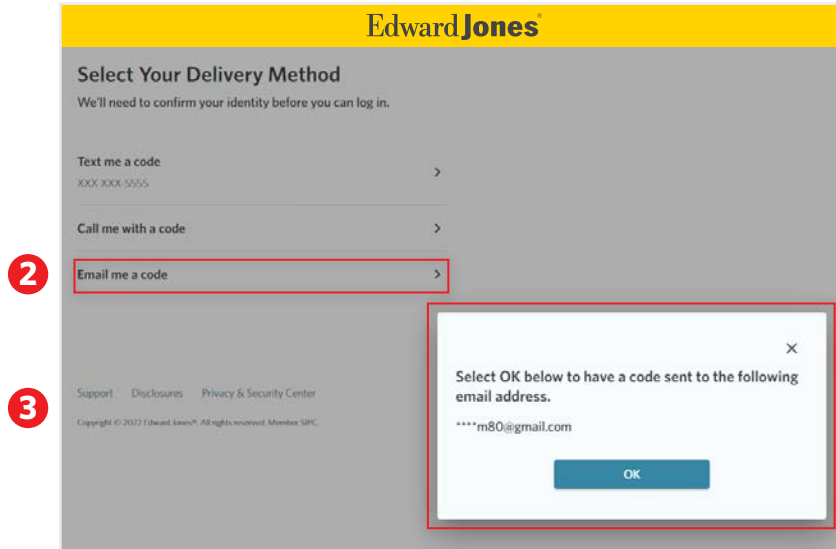
Select one of three options to receive your security code (continued)

D. Email me a code.

1. We'll email a security code to your email address on file.
2. Select "Email me a code."
3. Then click "OK."

4. Enter the code.

5. Click "Continue."





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STEP 02

Select one of three options to receive your security code (continued)

- 6. You'll be asked a security question before you can continue.
- 7. Choose if you'd like to remember your device.
- 8. Click "Log In" to complete your login.

Edward Jones

Answering this security question helps us verify your identity.

User ID: USERID123

6 **In what town or city was your first full time job?**

answer

Answer a different question

7 Remember this device ?

8 **Log 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.



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MOBILE DEPOSIT

STEP 01

Log in to Online Access

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

1. Enter your username and password.
2. Click "Log In."



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.

Edward Jones

Welcome to Online Access

1

Save user ID on this device

2

[Find your user ID](#) | [Reset your password](#)

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MOBILE DEPOSIT

STEP 02

Connect your accounts

1. Go to "Accounts."
2. Click the "Connect Accounts" button.

Edward Jones Snapshot **Accounts** Goals My Team & Messages Documents Banking More ▾ LINDSAY Log 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
Trad IRA-1 Edward Jones	****1522	Traditional IRA Select		\$1,181,069.85
Trad IRA-2 Edward Jones	****3868	Traditional IRA Select		\$35,805.20
Roth IRA-1 Edward Jones	****6163	Roth IRA Select		\$0.00
Joint-1 Edward Jones	****1551	Joint WROS		\$764.49
Trust-4 Edward Jones	****2921	Living Trust Unified Managed Account		-\$1,444.42



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MOBILE DEPOSIT

STEP 03

Select a site

1. Select a suggested site or enter the name or web address of the financial institution in the search box.
2. Select appropriate site.
3. Click "Search."

The screenshot displays the Edward Jones 'Site Selection' interface. At the top, the navigation bar includes the Edward Jones logo and menu items: Snapshot, Accounts, Goals, My Team & Messages, Documents, Banking, More, LINDSAY, and Log Out. The main content area is titled 'Site Selection' and features a search box with a magnifying glass icon. Below the search box is a grid of 12 suggested bank sites, each with a red circular icon containing a number 1 and the bank name and URL. A red box highlights the search box (Step 1) and the 'Bank Name Nine' suggestion (Step 2). A second screenshot below shows the search box with a red box around it (Step 3) and a list of search results, including 'Bank Name', 'Bank Name Advisors', 'Bank Name HSA', 'Bank Name - The Private Bank', 'Bank Name - Retirement Plan', 'Bank Name - Shares', and 'Bank Name - Asset Management'.



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MOBILE DEPOSIT

STEP 04

Verify your credentials

1. Enter your user ID and password for that specific account.
2. Click "Submit."

Note: The credential screen experience may differ depending on the institution.



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.



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MOBILE DEPOSIT

STEP 05

View your accounts

1. Once connected, the outside accounts will appear in the "Accounts" section.

The screenshot shows the 'Accounts' section of the Edward Jones user interface. At the top, there are navigation tabs: Snapshot, Accounts (selected), Goals, My Team & Messages, Documents, Banking, More, LINDSAY, and Log Out. Below the navigation, the 'Accounts' section is highlighted with a red box and a '1' in a red circle. It displays the Total Value (\$909,967.99) and Edward Jones Value (\$816,249.43). There is a dropdown menu for 'Account Actions' and a 'Connect Accounts' button. The main content area 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



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.



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MOBILE DEPOSIT

STEP 01

Log in to Online Access

If you haven't already signed up for text messaging during login, you can sign up by updating your account settings.

Edward Jones

Welcome to Online Access

Save user ID on this device

Log In

[Find your user ID](#) | [Reset your password](#)

[Support](#) [Disclosures](#) [Privacy & Security Center](#)

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MOBILE DEPOSIT

STEP 02

Update your account settings

1. Select "More" in the top header bar.
2. Click "Settings" in the drop-down menu.
3. Then click "Manage."

The screenshot shows the Edward Jones user interface. At the top, a navigation bar includes the logo and several menu items: Snapshot, Accounts, Goals, My Team & Messages, Documents, Banking, More (with a dropdown arrow), Grace, and Log Out. A red box labeled '1' highlights the 'More' dropdown menu. The dropdown menu is open, showing options: Transfers, Research & Market News, Settings (highlighted with a red box and '2'), Document Options, Account Connections, Support, and Remember This Device. Below the navigation bar, the 'Settings' page is displayed. It is divided into three main sections: Online Access Settings, Security Settings, and Document Delivery Settings. In the Online Access Settings section, there are fields for User ID, Password, Account Nicknames, Bill Payment, Alerts, and Closed Accounts, each with a corresponding 'Change' or 'Sign Up' link. In the Security Settings section, there is a 'Security Questions' section with an 'Add' link. In the Document Delivery Settings section, there are options for 'Stop/Start getting copies of documents', 'Statement Options', 'Contact Information', 'Email Address', 'Address', and 'Phone / Text'. A red box labeled '3' highlights the 'Manage' button next to the 'Email Address' field.



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MOBILE DEPOSIT

STEP 03

Manage your messages

1. Click the "Enroll in Texting" link next to the number you'd like to use for text messaging.

The screenshot shows the 'Manage Phone / Text' page in the Edward Jones online access system. The navigation bar includes the Edward Jones logo and links for Snapshot, Accounts, Goals, My Team & Messages, Documents, Banking, More, LINDSAY, and Log Out. The main heading is 'Manage Phone / Text'. Below it is the section 'My Phone Numbers' with an 'Add Phone Number' link. A table lists phone numbers with columns for Type and Number. The first row shows a Primary Mobile number (XXX-XXX-XXXX) with an 'Edit | 1 Enroll in Texting' link. The 'Enroll in Texting' link is highlighted with a red box, and a red circle with the number 1 is placed over the 'Edit |' text.

Type	Number	
Primary	Mobile	XXX-XXX-XXXX Edit 1 Enroll in Texting



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MOBILE DEPOSIT

STEP 04

Terms and Conditions

1. Read and accept the Terms and Conditions.
2. Scroll to the bottom.
3. Click "I have read and agree to the Edward Jones Consent to Texting."
4. Click "Send Verification Code."

Edward Jones Snapshot Accounts Goals My Team & Messages Documents Banking More LINDSAY 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](#)

1 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

2 **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. 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. Message frequency varies by account and preferences.

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.

3 I have read and agree to the Edward Jones Consent to Texting.

[Keep my current settings](#) **4** [Send Verification Code](#)



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STEP 05

Complete your verification

1. You'll receive a text with a verification code.
2. Enter the code in Online Access.
3. Then click "Complete Verification."

Edward Jones Snapshot Accounts Goals My Team & Messages Documents Banking More LINDSAY Log Out

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.

2

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

3 Finish Later **Complete Verification**



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STEP 06

Welcome to Edward Jones texting

1. Once your information is verified, you'll receive a welcome text.
2. Save your financial advisor's shortened number to your phone contacts and use it to communicate with your Edward Jones team.





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MOBILE DEPOSIT

STEP 01

View your documents

1. You'll receive an email letting you know you have documents to sign. Select the link in the email.
2. 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.
3. Click "View Documents."
4. Or you can navigate to your documents by logging in to Online Access and selecting "Documents" in the header.

Edward Jones

You have new documents to sign

Taylor,

Your financial advisor is requesting your electronic signature on one or more documents. By following the steps below, you agree to access and receive these documents electronically, and your consent is in effect until you sign them. If you'd like paper copies, you can request them from your financial advisor at no cost. To electronically sign your documents, simply follow these steps.

1. **Access your documents.** Click the "View Documents" link below.
2. **Click the "Sign" button next to the document.**
3. **Verify your identity, if prompted.**
4. **Review and consent to the e-signature Disclosure and Consent.**
5. **View and sign your document.** Review the document in its entirety and apply your e-signature to the last page.
6. **Click the "Finish" button to complete your e-signature of the document.**

3

[View Documents](#)

By using electronic signature, you acknowledge that certain risks exist with electronic delivery of documents, including but not limited to unauthorized access, systems outages and disruptions in telecommunications services. The safeguarding of your email address is your sole responsibility, and failure to do so may result in others viewing your private information.

If you have any questions about how to access or electronically sign your

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Edward Jones

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My Team & Messages

Documents

Banking

More

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MOBILE DEPOSIT

STEP 02

Sign your documents

1. You'll see the documents that need your signature under the "E-signature" section at the top.
2. Click the "Sign Document" button.

The screenshot shows the Edward Jones user interface. At the top is a navigation bar with the logo and menu items: Snapshot, Accounts, Goals, My Team & Messages, Documents (highlighted), Banking, More, LINDSAY, and Log Out. Below the navigation bar is the 'Documents' section. A note 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.' Underneath is an 'E-Signature' section containing a document entry: 'Individual/Joint Account Authorization' with a status of 'Posted 1/14/2020 | Expires 2/13/2020'. A red circle with the number '2' is placed next to the document, and a red box highlights the 'Sign Document' button.



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CONNECTING ACCOUNTS



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MOBILE DEPOSIT

STEP 03

E-signature Disclosure and Consent

1. Read and accept the Edward Jones Electronic Signature Disclosure and Consent.
2. Click "I have read and agree to the terms."

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.

2 [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



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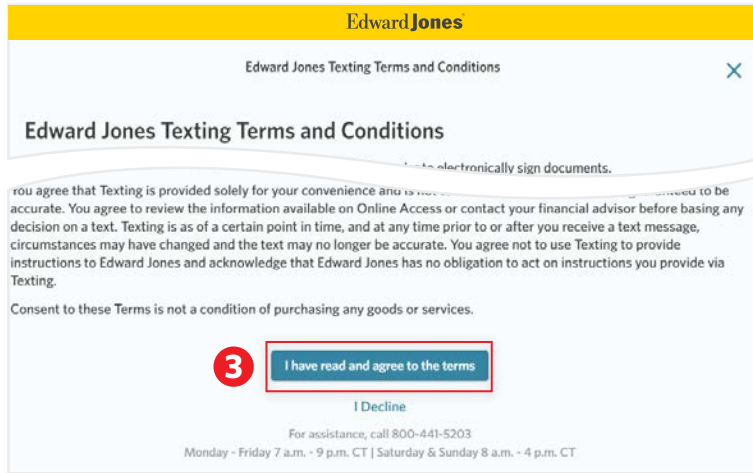
MOBILE DEPOSIT

STEP 04

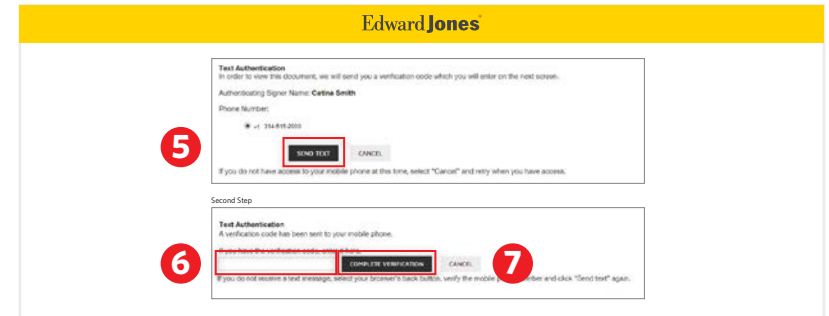
Confirm your identity

A. Text confirmation

1. 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.
2. Read and agree to the Terms and Conditions.
3. Click "I have read and agree to the terms."



4. 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.
5. Select "Send Text" to receive an authentication code from Edward Jones.
6. Enter the authentication code.
7. Click "Complete Verification."



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



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STEP 04

Confirm your identity (continued)

B. Identification questions

1. If your document requires identification questions, you'll see the following screen.
2. 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

1

2

CANCEL

NEXT

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



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MOBILE DEPOSIT

STEP 05

Open the document(s) and sign each box

1. Check the box "I have received, read and understand..."
2. Click the "Sign" button to capture your e-signature.
3. Click "Finish."

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.

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.

Owner/Custodian/Guardian's Signature

John Doe

Printed Owner/Custodian/Guardian's Name

XXXXX2785


Social Security Number

2/6/2017

Date

esign1test@edwardjones.com

Email Address



USSGLAUTHIRA2596668A17020600248—

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FINISH



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MOBILE DEPOSIT

STEP 06

Complete the signing process

1. 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 Banking More LINDSAY Log Out

Documents

- Latest
- Statements
- Quarterly Reports
- Account Verifications
- Notices
- Trade Confirmations & Prospectuses
- Tax Forms
- Signed Documents**
- From My Team
- Share Documents
- Proxies & Other Shareholder Materials

2 Signed Documents

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.

All Accounts Year-To-Date 1/1/2022 7/25/2022 Search (e.g. Document Name, 2019-05-01, etc.)

Signed documents are available for 12 months.

Posted Date	Account	Signed Date	Document	Download
5/24/2022	Lindsay's Roth IRA (Select) • ****1234	5/26/2022	Individual Retirement Account Authorization	Download
3/16/2022	Lindsay's Trust (Select) • ****1234	3/17/2022	Wired Funds Termination	Download
3/14/2022	Lindsay's Trust (Select) • ****1234	3/14/2022	TaSC LOA Wire Transfer	Download
1/21/2022	Lindsay's Trust (Select) • ****1234	1/21/2022	TaSC LOA Wire Transfer	Download



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CONNECTING ACCOUNTS



TEXT MESSAGING



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MOBILE DEPOSIT

STEP 01

Grab your check





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SIGNING UP



LOGGING IN



CONNECTING ACCOUNTS



TEXT MESSAGING



SIGNING DOCUMENTS



MOBILE DEPOSIT

STEP
02

Open the Edward Jones app from your smartphone or tablet





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LOGGING IN



CONNECTING ACCOUNTS



TEXT MESSAGING



SIGNING DOCUMENTS

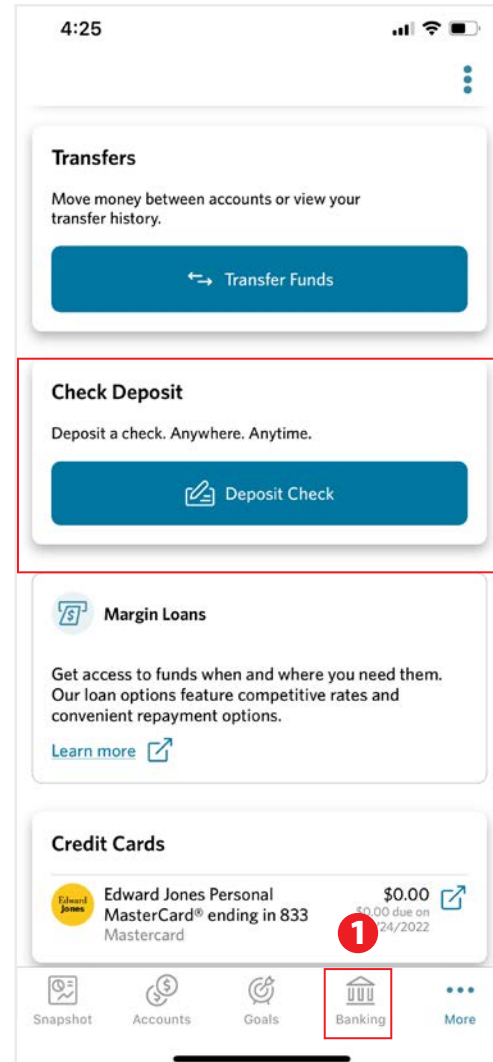


MOBILE DEPOSIT

STEP 03

Select "Check Deposit"

1. Open the app, log in and select "Banking" from the bottom navigation.
2. Then click "Deposit Check" from the list.





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SIGNING UP



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MOBILE DEPOSIT

STEP 04

Input the value of the check

1. Select your account.
2. Input the value of the check.

Back Check Deposit

[About check deposit](#)

To:

1 Select Account ▾

Amount:

2 \$

Front of Check Back of Check

Make Deposit

Cancel

Help | Disclosures | Full Site

Snapshot Accounts Goals Banking More



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MOBILE DEPOSIT

STEP 05

Take a photo of the front of your check





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MOBILE DEPOSIT

STEP 06

Take a photo of the back of your check

1. Verify to whom the check is payable.
2. If payable to you, write "Deposit at Edward Jones" above your signature.
3. Click "Next."

Back **Check Deposit**

Endorsement Instructions

The check is payable to:

1 Me Edward Jones

Someone Else

2 Include the following on the back before taking the picture:

- Write: Deposit at Edward Jones
- Your signature

Your check cannot be processed without this information.

Deposit at Edward Jones
John Doe

3

Snapshot Accounts Goals Banking More



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MOBILE DEPOSIT

STEP 07

Select "Make Deposit"

The screenshot shows a mobile app interface for a check deposit. At the top, there is a back arrow and the text '< More'. Below this is a section titled 'About check deposit' with an information icon. The 'To:' field is set to 'IMA (XXX-XX238-1-8) \$150.12'. A note states 'You can deposit up to \$50,000.00 today in this account via mobile.' The 'Amount:' field contains '10000'. There are two green buttons with checkmarks: 'Front of Check' and 'Back of Check', each with a corresponding image of a check. At the bottom of the main area, a blue button labeled 'Make Deposit' is highlighted with a red box, and a red circle with the number '1' is placed to its left. Below it is a 'Cancel' button. At the very bottom, there is a navigation bar with icons for 'Snapshot', 'Accounts', 'Goals', 'Banking', and 'More'.

For additional assistance, visit 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).