

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.

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.

- Log in to your Online Access account through edwardjones.ca

- Click **Secure Login**
- Enter **User ID** and **Password**
- Click **Log In >**

Country: Canada | English 1 Secure Login

Insights 2 Find a Financial Advisor

Welcome to Online Access

User ID:

Password:

Save user ID on this device

3 Log In > [Forgot user ID or password?](#) [Online Access Security](#)

Not enrolled in Online Access? [Get Started](#)

Step 2:

Click **Settings**.

Edward Jones®

Take a Tour

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

Messages Home **Settings** Log Out

Accounts Documents Research & Market News

Investment Accounts

Quick Links


Total Value of Accounts **\$62,950.86 CAD**
As of 2018/10/05

Account Name	Currency	Current
Individual-1	CAD	\$62,950.86
RRSP-1		
Total	CAD	\$62,950.86

Exchange Rate (CAD/USD) as of 2018/10/05 = 1.2975

[Summary of Accounts >](#)

My Financial Advisor

 **Josh Downs**
12345 Main Street
Unit #2
Toronto, ON H9R 4K8
(555) 555-5555
Sr. Branch Office Administrator
Allison Brightstar

[Send Secure Message >](#)

Today in the Market

-188.97 -84.08 -15.67

Step 3:

Locate Account Sharing and click **Manage >**.

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 the accounts of others

Click **Share My Account >**.

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

[Messages](#) | [Home](#) | [Settings](#)

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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.

Step 5:

1. Enter the email address for the person you are inviting to view your account(s). Note: if the email address is tied 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?
 ✕

Email must belong to an existing Online Access user.

2 Confirm email:

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

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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Welcome back, James L. Last Login 2018/10/05 03:
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🏠 Home
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Manage Account Sharing

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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 RRSP-1	Sent	October 05, 2018	Cancel Request >
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Pending Received Requests

You have no Received Requests that are pending.

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Steps continue on next page.

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.

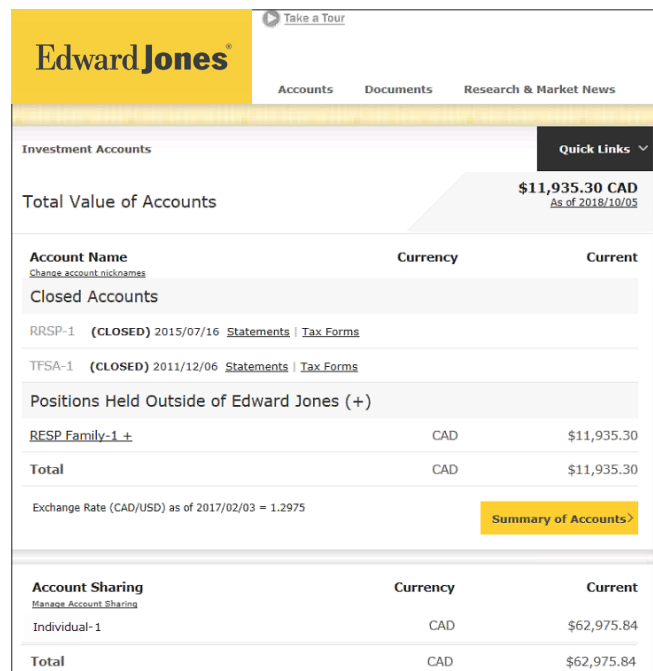
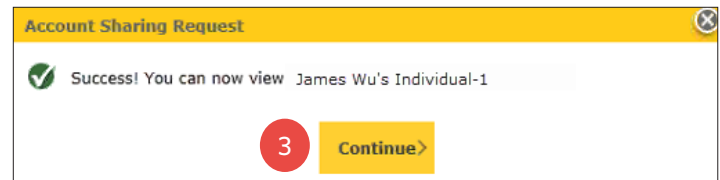
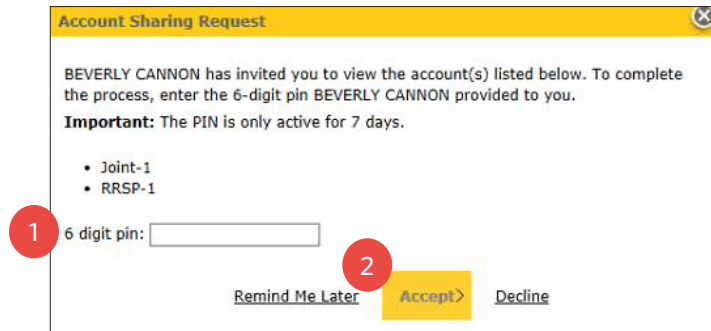
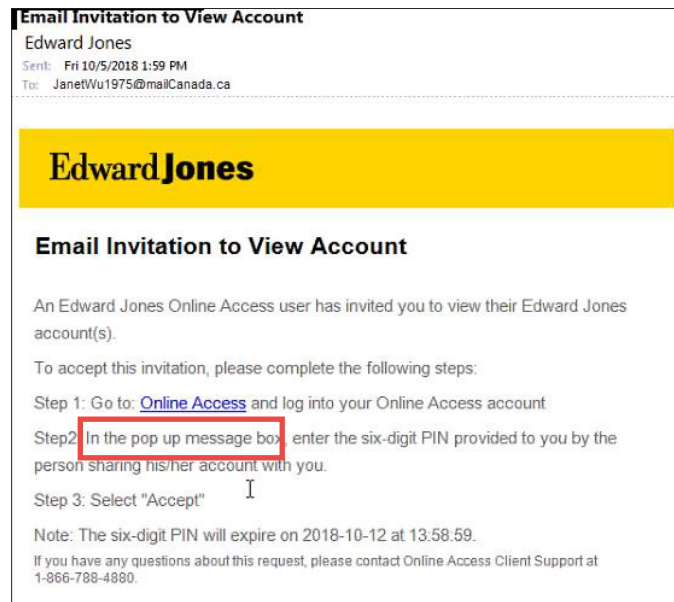
To accept the invitation to view the shared account, the person must:

- Log in 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 >**.

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



The account sharer can go to their Account Sharing Summary and cancel viewing account by clicking **Cancel Sharing** > under the **Others' Accounts I am Viewing** header.

The account sharer has the same option to cancel the viewing access except their **Cancel Sharing** button will be listed under the **My Accounts Others are Viewing** header.

The screenshot shows the Edward Jones website interface for account sharing management. At the top left is the Edward Jones logo. To the right are navigation links for Messages, Home, Settings, and Log Out. Below the logo is a navigation bar with 'Accounts', 'Documents', and 'Research & Market News'. Under 'Accounts', there are sub-tabs for 'Summary', 'Holdings', 'Activity', and 'Performance'. The main heading is 'Manage Account Sharing'. On the left, a box contains instructions: 'Send an invitation to get started sharing your account with another person.' and '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.' Below this is a yellow 'Share My Account >' button. On the right, there are three sections: 'My Accounts Others Are Viewing' (with the message 'You have not shared any of your accounts.'), 'Others' Accounts I am Viewing' (with a table entry for 'James Wu' under 'Individual-1' and a 'Cancel Sharing >' button), 'Pending Sent Requests' (with the message 'You don't have any pending sent requests.'), and 'Pending Received Requests' (with the message 'You have no Received Requests that are pending.').

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Messages | Home | Settings | Log Out

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

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.