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
- 1. Click Secure Login
- 2. Enter User ID and Password
- 3. Click Log In >



Step 2:

Click Settings.



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Step 3:

Locate Account Sharing and click Manage >.

Settings	
Online Access Settings	Document Delivery Settings
User ID: JWWU1971 Change >	Go green with e-delivery.
	[Enroll now for all] Manage >
Password Change >	
Document & Notification Language: English Change >	Contact Information
	Email Address
Account Nicknames	James@mail.ca Manage >
XXX-XX974-1-5 Individual-1	
XXX-XX292-1-8 RRSP-1	Address 5100 San Felipe Drive
Alerts Manage >	Toronto, ON MSA 1Y1
Chard Lawrence	Phone / Text
No recently closed accounts are available to display for your user ID.	(416) 555-0741 Heme (416) 555-3538 Mobile
Account Sharing	Manage >
Manage >	
Security Settings	
occarry occarry	•
Remember this device for future logins?	
Security Questions To what city or town did you meet your spouse/partner?	
- an initial any or commute you more your operately particles	

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 >.



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Step 5:

- 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 >.





Success! Your request has been sent to the email you provided.

• The success message will display.

Step 6:

- Your invite will remain in pending status for 7 days or until the other user logs in and inputs the 6 digit PIN completing the account sharing process.
- You can cancel the request at any time by clicking **Cancel Request >.**

		Welcome back, James La Last Login 2018/10/05 03	
Edward Jones		🔀 Messages Home Settings	
	Accounts Documents Research & Market News		
Summary Holdings Activity Perform	nance		
Manage Account Sharing			
	My Accounts Others Are Viewing		
Send an invitation to get started sharing your account with another person	You have not shared any of your accounts.		
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.	You are not viewing any other accounts.		
	Pending Sent Requests		
Share My Account > JanetWu197	JanetWu1975@mailCanada.ca Individual-1 Sent October RRSP-1	05, 2018 Cancel Request >	
	Pending Received Requests		
	You have no Received Requests that are pending.		

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Step 7:

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

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

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

• 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.**

An Edward Jones Online Access user has invited you to view their Edward Jone account(s). To accept this invitation, please complete the following steps: Step 1: Go to: Online Access and tog into your Online Access account Step 3: Select 'Accept' I Nete: The six-digit PIN will expire on 2018-10-12 at 13.58.59. Tyou have any estimate account with you. Step 3: Select 'Accept' I Nete: The six-digit PIN will expire on 2018-10-12 at 13.58.59. Tyou have any estimate about this request, please contact Online Access Client Support at 1-866-789-4890. CCOUNT Sharing Request EVERLY CANNON has invited you to view the account(s) listed below. To com the process, enter the 6-digit pin BEVERLY CANNON provided to you. mportant: The PIN is only active for 7 days. 1 Joint-1 I I I I I I I I I I I I I I I I I I I	To: JanetWu1975@mailCanada.ca		
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Individual-1

Total

\$62,975.84

\$62,975.84

CAD

CAD

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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.

Edward Jones ®	Accounts	Documents	Research & Marke	Messages	Home Settings Log Out	
Summary Holdings Activity Per	formance					
Manage Account Sharing						
Send an invitation to get started sharing your account with another person.	My Acc	ounts Others A	re Viewing f your accounts.			
Note that by sharing accounts, you will be sharing information about your account values, tax documents	Others	Others' Accounts I am Viewing				
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	You ha	ve no Received Req	uests that are pending.			

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