

Online Access Client Enrolment User Guide

Enables clients to:

- Check in with your financial advisor
- Monitor/interact with your accounts on your terms
- Access your statements, reports, and tax information
- Securely send and receive messages and documents

Step 1:

1. When enrolling in Online Access and setting up a new account, go to **edwardjones.ca** and click on **Secure Login**>> click **Get Started**.

Or

If you are already enrolled, go to **edwardjones.ca**>>**Account Login**, enter your User ID and Password, then click Log In >.

Note: Do not click **Save User ID on this device** if you are on a public or shared computer. Doing so could put your account privacy at risk.

Welcome to Online Access

User ID:
|

Password:
|

Save user ID on this device

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

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

Step 2:

The Online Access Sign-Up screen is the first screen you will use to complete your registration for Online Access.

There are seven steps to complete your enrolment in Online Access. Completion progress is tracked by the shaded circle progress tracker.

Verify Your Identity

1. Enter the **first 8 digits** of your account number.
2. Enter the date of birth on the account in the YYYY/MM/DD format.
You must enter the slashes.
3. Enter the last four digits of your SIN or full Driver's Licence Number.
4. Click **Next >**.

Online Access Sign-Up

Verify Your Identity

● ○ ○ ○ ○ ○ ○

1 Account Number: 99755974 ?
First 8 digits

2 Date of Birth: 1956/01/18
YYYY/MM/DD

3 Last 4 digits of SIN or full Driver's Licence #: 5555

4 Next >

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Step 3:

1. User IDs and passwords are something you create that is unique and memorable for you. Some people use their email address. As a security measure, that is not recommended. The password strength indicator is shown as you are entering the password (weak, medium, strong)

2. Click **Next >**.

An email will be sent from Online Access System to the email address we have in your file and you will have the opportunity to change the email address if necessary.

1. Review the email address on file and update as necessary.
2. Click **Next >**.
3. Open your email application and click the Complete Sign up link to verify the email address and automatically move to the next step in the enrolment process.



Before you complete your enrolment, we need to verify your email address.

We sent a link to:
james@mail.ca

Go to your email and click the link provided. You will be taken to a page that allows you to complete your sign-up.

Didn't receive the email?

- [Send me another email](#)
- [Update my email address](#)

Note: The email is instant and looks like this. If you do not get the email, check your spam folder.

E-Delivery User Guide

No more mail to sift through or paper to shred.

- Access your statements, quarterly performance reports, trade confirmations, and tax documents
- Receive e-mail notifications when account documents are available online

Step 4:

After accepting the Online Access Terms & Conditions (see bottom of page), the e-Delivery page will display.

1. You will be prompted with 2 options:
 - i. E-delivery for all my documents
 - ii. View paper delivery options

Choose the appropriate option as per your preference

Note: To enrol in e-Delivery you must accept the terms and conditions of the program. You can click the Download and Print (PDF). Retain it for your records.

2. Click I have read and accept the terms >.

Note: Clicking **I Decline** means you will not be enrolled in .ce-Delivery and will continue to receive paper documents.

1

Choose your delivery options

Reduce the amount of paper mail you receive and get fast, secure access to your documents with e-delivery. We'll email you a notification when the following documents are posted in Online Access: statements, trade confirmations, regulatory documents and tax documents.

E-delivery for all my documents

View paper delivery options

Individual-1 (xxx-xx974)

RRSP-1 (xxx-xx292)

Learn more about [document types](#).

When a new document is ready for you, we will send an email notification to james@mail.ca.

Please scroll through and read the Terms & Conditions below, then click the button to continue.

E-delivery Terms & Conditions

[Download & Print \(PDF\)](#)

2

Terms & Conditions

Scroll through and read the Terms & Conditions below.

[Download & Print \(PDF\)](#)

Edward Jones Online Access Terms and Conditions

These terms and conditions ("Terms") are between you and Edward Jones and govern your access to and use of Edward Jones Online Access ("Site"), and the services ("Services") and information ("Information") and collectively with Site and Services, "Online Access") contained therein. By viewing or using Online Access, or by otherwise indicating your acceptance of the Terms, you accept and agree to be bound by 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) ("Account Agreement").

Edward Jones may change these Terms at any time by updating them on Online Access without providing further notice to you. You agree that if you view or use Online Access after these Terms are updated, your continued viewing or use indicates your binding acceptance of such change. You agree to regularly review these Terms to be aware of any changes. At the time of a change to these Terms, you have the right to reject such change by discontinuing your use of Online Access.

You acknowledge that: (a) Online Access is for informational purposes only; (b) nothing on Online Access constitutes an offer to sell or a solicitation of an offer to buy, a security; (c) you have read in its entirety, understand and agree to be bound by these Terms; (d) Online Access does not provide or constitute investment, tax or legal advice, and you will not use it as such; (e) subject to Edward Jones' privacy statement and privacy notice (available at <https://www.edwardjones.ca/disclosure/account-protection-privacy-notice.html>), together, the ("Privacy Policy"), Edward Jones and its employees, representatives, and agents (each in any form), retain and use any communication or information transmitted between you and Edward Jones on Online Access; and (f) certain Services have additional terms and conditions located on Online Access, and your viewing or use of such Services constitutes your agreement to these additional terms and conditions.

third party's terms of access and use.

If you are using Online Access as an authorized party of an Edward Jones account owner, you acknowledge that you must obtain your own unique Login, and you represent that you are authorized by the account owner to access information related to them and their account.

12. Indemnification

You hereby agree to indemnify and hold harmless Edward Jones and its managers, principals, associates, employees, affiliates, vendors, licensors and agents, and any third-party providers from and against all claims, losses, liabilities, damages, costs and expenses (including reasonable legal fees and expenses) arising out of or related to your use of these Terms or your use of Online Access (i) in violation of these Terms; (ii) in violation of any rights of Edward Jones or any third-party provider, including copyright, patent, trade secret, trademark or other intellectual property rights and publicity and privacy rights; (iii) in violation of any applicable law, rule or regulation; (iv) in a negligent or illegal manner or (v) your failure to maintain the security of your Logins as applicable in accordance with this Agreement. This indemnification is binding upon you and your executors, heirs, representatives, successors and assigns.

13. 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 the breach thereof.

[I have read and accept the terms >](#)


[I Decline](#)

For assistance call 1-866-798-4800
Monday - Friday 8 a.m. - 10 p.m. ET | Saturday & Sunday 9 a.m. - 5 p.m. ET

E-Delivery User Guide

Step 4:

If you select the **View paper delivery options**, this menu will display for you to choose which document you prefer to receive as paper for each account.

	<input type="radio"/> E-delivery for all my documents		
	<input checked="" type="radio"/> View paper delivery options		
Selecting "mail paper" disables e-delivery for that particular document			
	Statements & Reports	Trade Confirmations & Regulatory Documents	Tax Forms
 Individual-1 (xxx-xx974)	<input type="checkbox"/> Mail paper	<input type="checkbox"/> Mail paper	<input type="checkbox"/> Mail paper
 RRSP-1 (xxx-xx292)	<input type="checkbox"/> Mail paper	<input type="checkbox"/> Mail paper	<input type="checkbox"/> Mail paper

Text Messaging User Guide

Text with your branch team and take advantage of added security features.

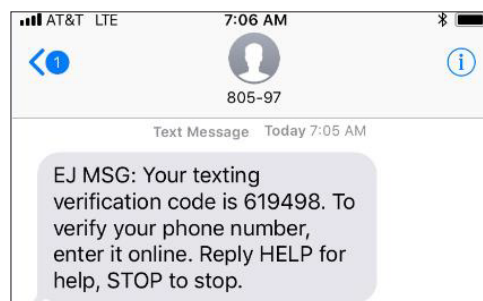
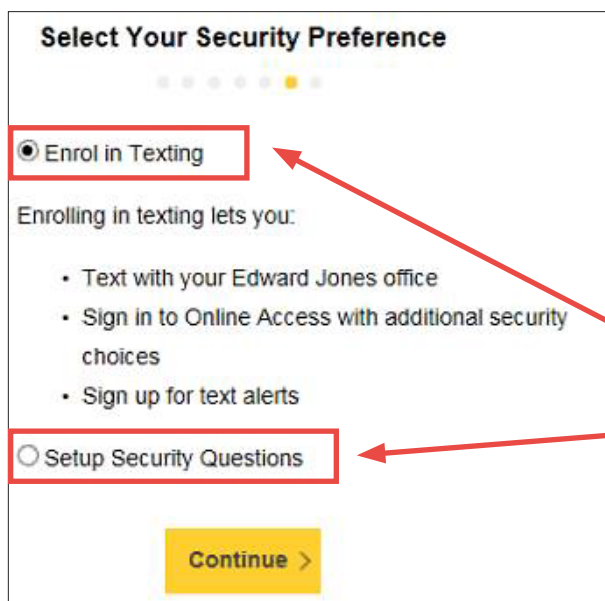
You can:

- Text with your financial advisor and receive text appointment reminders via text
- Text the word “Connect” to 30597 to start texting, or visit edwardjones.ca/text

Step 5:

Enrolling in Texting will allow you to authenticate via text. If you are not enrolled in texting, you will have the texting option grayed out on the two-step authentication screen.

After selecting ‘Enrol in Texting’, you will need to input your mobile number. Our system will send you a unique verification code via text (seen in this screenshot), which you will need to input to complete enrolment in Texting.



- a. If you select texting, you will click **Continue** to enter the number for texting.
- b. If you select security questions, you will click **Continue** to setup your questions and answers.

After you make your selection, you will click **Complete Enrolment**. Next, you will receive a welcome email with a reminder of the User ID you selected and a link to Online Access login portal.

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