# **Online Access:** Adding/Updating a phone number user guide

Allows you to update your phone number so that Edward Jones has the proper information and is able to contact you on the correct device via phone call or text if desired.

1. Log in to Online Access at www.edwardjones.ca/login and click **Settings.** 

dward <b>Jones</b> ®	Accounts D	ocuments	Welcome back, James. Last Login 2018/10/18 14:14 ET Messages (2)   Home   Settings   Log Out Research & Market News
ettings			
Online Access Settings			Document Delivery Settings
User ID: JWWU1971		Change >	Songratulations, you are 100% green. Manage >
Password		Change $>$	
Document & Notification Language:	English	Change >	Contact Information
Account Nicknames			james@mail.ca Manage >
XXX-XX974-1-3 Ind	ividual-1	Change >	Address
XXX-XX292-1-1 RR5	SP-1		5100 San Felipe Drive
Alerts		Manage 🗦	Toronto, ON M5A 1Y1
Closed Accounts: 2 closed accounts are	displayed	Change >	Phone / Text 416-555-3538 Mobile 416-555-0741 Home
Account Sharing		Manage >	Manage >

#### **Enrol in Texting**

To begin texting with Edward Jones if you're not already enrolled, click **Enrol in Texting.** The Manage Text Settings screen will display.

My Ph	one Nu	mbers		[ Add Phone Number
	Туре	Number		
Primary	Mobile	416-555-3538	Edit   Delete	Enrol in Texting

## Edward Jones®

From this screen you can:

- Begin texting with the selected phone number
- Add a new phone number
- Learn about texting
- Print the Terms & Conditions

**Note:** Terms and conditions must first be accepted and you must verify your mobile number before texting can begin.

Keep my current settings

To confirm your desire to enrol in texting, you must:

- 1. Check the box to agree to the Terms & Conditions.
- 2. Click **Send Verification Code >.** The screen changes for you to enter the verification code.
- Enter the code and click Complete Verification >. When the number is verified, the Manage Alerts screen displays.

	Manage Text Settings				
	A verification code was sent to 416-555-3538. If you have the verification code enter it here to complete your verification for Edward Jones texting.				
3	3 724584 Can't find your code? <u>Send me another verification code</u>				
	Finish Later Complete Verification>				
	This site is designed for Canadian residents. The services offered within this site are availab the provinces and territories for which they are properly registered. Please note that not all				
	While Edward Jones has made every reasonable attempt to assure the accuracy of account other official communications from Edward Jones. To report any issues or errors, please en disclosures, can be found at <u>www.edwardjones.ca/disclosures</u> . In Québec, our advisors are				

Send Verification Code

Manage Alerts	5	
Edward Jones re	quires your financial ac	If you have previously set up alerts on user IDs or accounts associated with Josh Downs' office, they will now be sent to this number. dvisor to use this number to text with you. Going forward, please use (555555555555555555555555555555555555
Alert Settings	About alerts   Ter	ms & Conditions
Email		<u>Edit</u>   <u>Delete</u>
Text message		Edit   Delete
Security Alert	Text	Alert
Required		My password has changed
Required		My email has changed
		My user ID has been locked
		My user ID has changed
Required		I've received a secure message in Online Access
For your convibution and		Keep my current alert settings

This screen shows which alerts must come by email and allows you to also receive them by text. You can also elect to receive a text when your User ID has been locked or changed.

Make your selections and click **Save.** 

ome back, James. Last Login 2018/10/18 14:14

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#### **Add Phone Number**

From the Manage Phone/Text screen, you can:

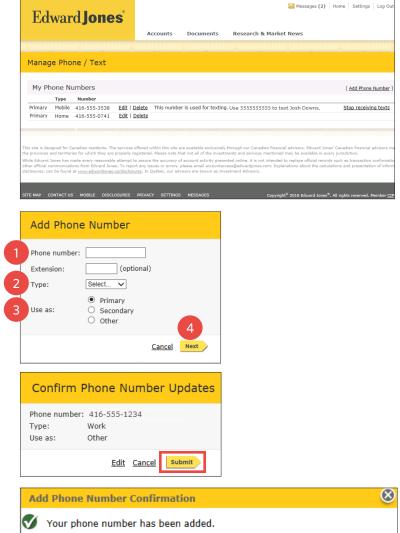
- Edit or Delete an existing phone number
- Opt out of the texting feature by clicking **Stop receiving texts**
- Add a Phone Number



- 1. Enter the new phone number.
- 2. Select if mobile, home, or work.
- 3. Identify as primary, secondary, other.
- 4. Click Next.

Confirm your entry and click:

- Edit to change
- Cancel to exit
- Submit if correct



#### Your Address Or Phone Number Has Been Updated

This email confirms that you updated your address or phone number via Edward Jones Online Access on Oct. 18, 2018.

If you changed a phone number that was verified and used for texting with Edward Jones, you will no longer receive text messages, text alerts or two-step authentication that you may have set up. Please log in to online access and verify your new mobile number so your texting services can continue.

Click **Submit**, the new phone number confirmation displays and an email confirmation will be sent to you when a phone number is updated.

#### **Edit Phone Number**

If you click Edit, the manage Phone Number screen displays.

- Click No, do not change to exit
- Click Yes, change phone number > to edit an existing number

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#### **Stop Receiving Texts**

Clicking Stop Receiving Texts opens the Unverify **Your Phone Number** screen.

- Click No, continue receiving texts > to exit
- Click Yes, stop receiving texts > to stop using this number for texting with the firm

If you click **yes**, you will receive this email confirming the change.

Manage Phone Number			$\otimes$				
alerts or two-step authenticatio	You have requested to receive alert notifications at this phone number. After you change your phone number, any text messages, text alerts or two-step authentication that you may have set up will only be sent to the new phone number and only after you have verified it. If you proceed, you will no longer receive these types of messages at your old number. Are you sure you want to change your phone number?						
	No, do not change	Yes, change phone number					

### Edward Jones

#### You Turned Off Texting with Edward Jones

On Oct. 18, 2018, you replied STOP to a text from Edward Jones or took action to stop receiving texts in online access.

Due to this change, the phone number 416-555-3538 v/ill no longer receive text messages, text alerts or two-step authentication that you may have set up. If you have a new mobile number and wish to continue receiving texts from Edward Jones, you need to <u>log in</u> to online access and verify your number in "Settings".

If you did not recently reply STOP, please call 855-283-3677 for assistance.

#### **Delete Phone Number**

If you click **Delete**, the **Delete Phone Number** confirmation screen displays. Click **Delete** to remove the number from the system or **Cancel** to exit. If you select delete, you will receive an email confirming this change. Please note: you must have at least one phone number on record at all times.

Delete Phone Number		$\otimes$		
Are you sure you want to delete the phone number 416-555-0741?				
Cancel	Delete>			
Delete Phone Number Confirmation				
🍼 Your phone number has been deleted.				