

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**.
2. Click **Manage** next to the Phone/Text header.

Edward Jones®

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

Messages (2) | Home | Settings | Log Out

Accounts | Documents | Research & Market News

Settings

Online Access Settings

User ID: JWWU1971 [Change >](#)

Password [Change >](#)

Document & Notification Language: English [Change >](#)

Account Nicknames [Change >](#)

XXX-XX974-1-3 Individual-1
XXX-XX292-1-1 RRSP-1

Alerts [Manage >](#)

Closed Accounts: 2 closed accounts are displayed [Change >](#)

Account Sharing [Manage >](#)

Security Settings

Document Delivery Settings

Congratulations, you are 100% green. [Manage >](#)

Contact Information

Email Address

james@mail.ca [Manage >](#)

Address

5100 San Felipe Drive
Toronto, ON M5A 1Y1

Phone / Text

416-555-3538 Mobile
416-555-0741 Home [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.

Manage Phone / Text

My Phone Numbers [\[Add Phone Number \]](#)

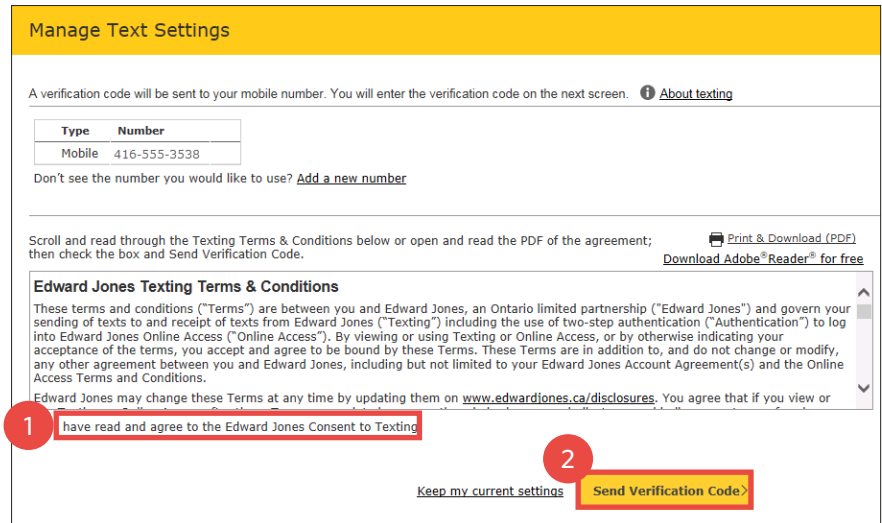
	Type	Number	
Primary	Mobile	416-555-3538	Edit Delete Enrol in Texting

This site is designed for Canadian residents. The services offered within this site are available in the provinces and territories for which they are properly registered. Please note that not all of the services offered within this site are available in all provinces and territories. While Edward Jones has made every reasonable attempt to assure the accuracy of account activity information, other official communications from Edward Jones. To report any issues or errors, please email feedback@edwardjones.ca. For more information on our disclosures, can be found at www.edwardjones.ca/disclosures. In Québec, our advisors are known as financial planners.

From this screen you can:

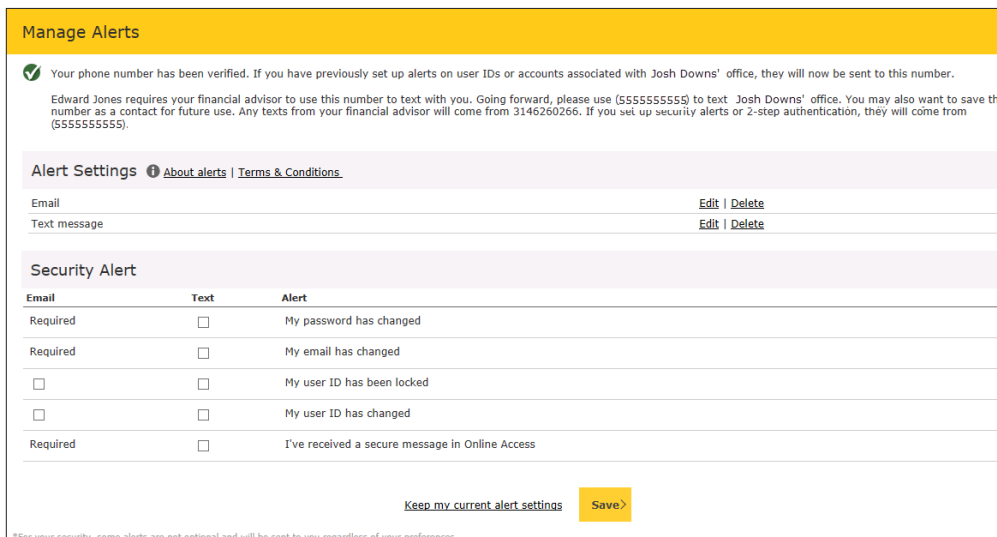
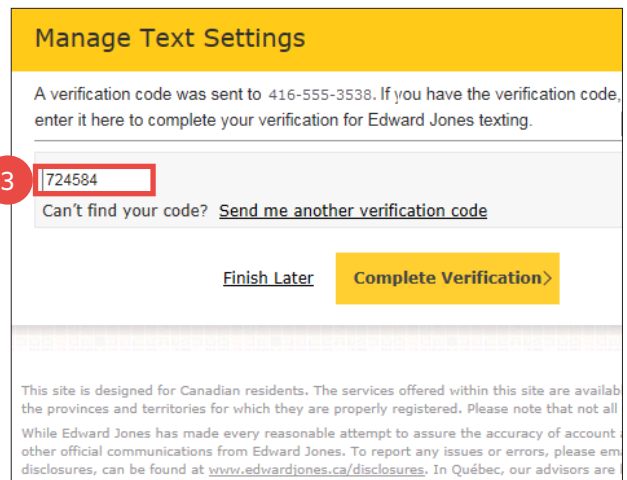
- Begin texting with the selected phone number
- Add a new phone number
- Learn about texting
- Print the Terms & Conditions

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



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.
3. Enter the code and click **Complete Verification >**. When the number is verified, the **Manage Alerts** screen displays.



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**.

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**

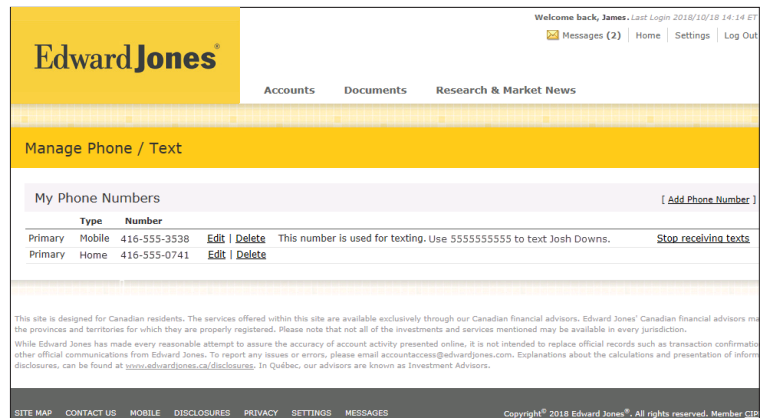
When you click Add Phone Number, the **Add Phone Number** screen displays.

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

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



Add Phone Number

1 Phone number:

2 Extension: (optional)

3 Type:

Use as:

Primary

Secondary

Other

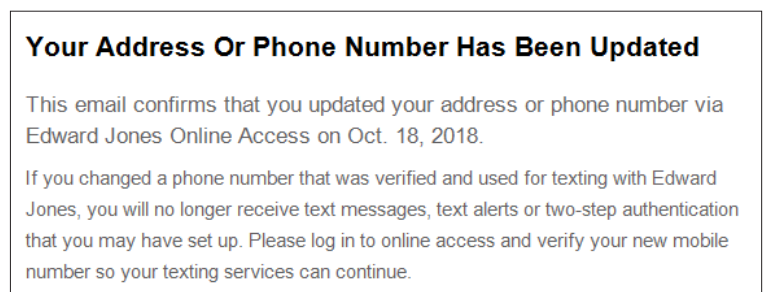
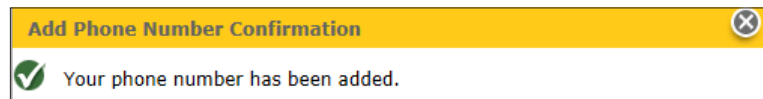
4

Confirm Phone Number Updates

Phone number:

Type:

Use as:



Edit Phone Number

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

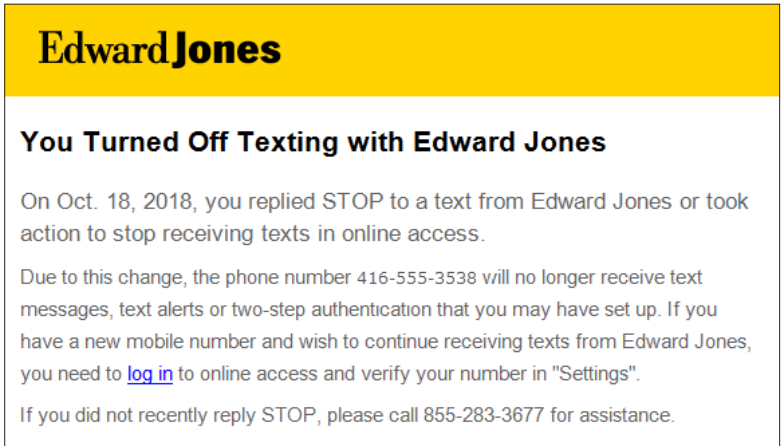
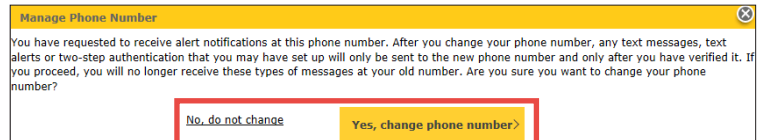
- Click **No, do not change** to exit
- Click **Yes, change phone number >** to edit an existing number

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.



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.

