Online Access: e-Delivery User Guide

e-Delivery reduces paper mail and makes keeping track of important documents simple. e-Delivery is now available for the following documents: account statements, trade confirmations, notices & disclosures and tax documents.

This guide is intended for clients who are already enrolled in Online Access. For steps on how to enrol in Online Access and e-Delivery, please see the Online Access Client Enrolment User Guide.

Here's how you can sign-up for e-Delivery through your Online Access account. Log in to Online Access at **edwardjones.ca/login.**



Once you are logged in, click on **Settings** located near the top right of the page.



The **Document Delivery Options** page will open.

Edward Jones®

Next, you will be required to read the e-Delivery **Terms and Conditions.**

Check off the box for **Select e-Delivery for all documents** to automatically enrol all of your accounts in e-Delivery or use the individual check boxes to customize your preferences by account.

				Welcome back, Robert. Last Login 2024/01/25	5 17:07
				🖾 Messages Home Settings	Log O
Edward lones					
Luwarujones					
	Accounts	Documents Research &	Market News		
Document Delivery Option	S				
Robert, you last updated your document of	delivery preferences on	January 29,2024 at 16:20 ET			
< Clan 4: Co Croon! Polost the desumants					
Step 1. Go Green! Select the documents	; you want to receive by a	e-delivery. 🕕 Learn more about docum	ent types and delivery options		
Step 1. Go Green! Select the documents	; you want to receive by (e-delivery. 🗊 Learn more about docum	ent types and delivery options		
Select e-delivery for all documents.	s you want to receive by a	e-delivery. 🖤 <u>Learn more about docum</u>	ent types and delivery options		
Select e-delivery for all documents.	s you want to receive by a	e-delivery. 🖤 Learn more about docum	ent types and delivery options	Noticos & Disclosuras	
Select e-delivery for all documents.	tatements	Trade Confirmations	Tax Forms	Notices & Disclosures	
Select e-delivery for all documents.	tatements	e-delivery. 🖤 Learn more about docum Trade Confirmations	Tax Forms	Notices & Disclosures	
Select e-delivery for all documents.	tatements	e-delivery. Usam more about docum Trade Confirmations	Tax Forms	Notices & Disclosures	
Select e-delivery for all documents. Select e-delivery for all documents. Individual-1: Unchecked boxes indicate physical (pape types with unchecked boxes.	itatements if * if delivery unless anoth	Trade Confirmations	Tax Forms	Notices & Disclosures	nent
Setup 1: So Green Setect the documents Setect e-delivery for all documents. Individual-1 : Unchecked boxes indicate physical (pape types with unchecked boxes. Another authorized party on this accour	tatements	Trade Confirmations Trade Confirmations * * er authorized party on the account ha e e-delivery of this document type.	Tax Forms	Notices & Disclosures	
Select e-delivery for all documents. Select e-delivery for all documents. Individual-1 : Unchecked boxes indicate physical (pape types with unchecked boxes. *Another authorade party on this accourt *for excounts with multiple authorade yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with multiple authorated yearty on this accourt *for excounts with authorated yearty on this accourt *for excounts with authorated yearty on this accourt *for excounts *for	tatements	Trade Confirmations Trade Confirmations real-authorized party on the account ha e-e-dailvary of this document type, ances of the authorized party who has	Tax Forms Tax Forms S elected e-delivery. Clicking "Sub most recently updated the e-deliv	Notices 8. Disclosures * * mt* below will set paper delivery for any docun any preferences will be applied to the account.	nent
Select and other select the documents Select a-delivery for all documents. Individual-1 : Unchecked boxes indicate physical (pape types with unchecked boxes. * after accounts with multiple authorized	tatements	Trade Confirmations Trade Confirmations Trade Conf	Tax Forms art forms are a forms s elected e-delivery. Clicking "Sub- most recently updated the e-deliv	Notices 8. Disclosures	nent
Select e-delivery for all documents. Select e-delivery for all documents. Individual-1 : Unchecked boxes indicate physical (apper view of the unchecked boxes. **for accounts with multiple authorized j Selep 2: Your Email Address	tatements	Trade Confirmations Trade	Tax Forms	Notices 6. Disclosures * * mit* below will set paper delivery for any docum ary preferences will be applied to the account.	nent
Setup 1, so shawn Select the occuments Select a-delivery for all documents Select a-delivery for all documents Individual-1 : Unchecked boxes indicate physical (pape types with unchecked porties, this account **For accounts with multiple authorized for the authorized parties Setup 2: Your Email Address Famil address incheal charmefiewardion	tatements t t t t t t t t t	Trade Confirmations Trade Confirmations at " rer authorized party on the account he re dailwary of this document type, ances of the authorized party who has	Tax Forms and Yours and delivery options and " s elected e-delivery. Clicking "Sub- most recently updated the e-deliv	Notices & Disclosures " " " " " " " " " " " " " " " " " " "	 nent

After you have read the Terms and Conditions, click the box **"I have read and agree to the Edward Jones consent to e-Delivery"** at the bottom of the page.

Next, click on the **Submit** button.

Email address: michael borne@es	wardiones com Change			
Lines address. michael.nome.per	and gones.com <u>crunge</u>			
📥 Step 3: Consent to E-delivery				
Scroll and read through the Agree then check the box and Submit.	ment below or open and read the PDF of the agreement;	Download Adobe	8 Download (PDF) ®Reader® for free	
Edward Jones E-delivery T	erms and Conditions		A	
These terms and conditions ("Ter Terms, as well as by viewing or u to, and do not change or modify, Account Agreement(s) ("Account	ms") govern your receipt of certain account-related informatio sing Edward Jones Online Access ("Online Access"), you accep any other agreement between you and Edward Jones, includin Agreement") and the Online Access Terms and Conditions.	n via electronic delivery. By a t these Terms. These Terms a ng but not limited to your Edv	agreeing to these are in addition vard Jones	
Edward Jones may change these Access after these Terms are upo reject such change by canceling	Terms at any time and without notice by updating them on On lated, you will be bound by such change. At the time of a chan E-delivery.	line Access. You agree that if ge to these Terms, you have	you use Online the right to	
I have read and agree to the	Edward Jones Consent to E-delivery			
	Keep My Current Delivery Settings	Submit>		
	Keep My Current Delivery Settings	Submit>		
	Keep My Current Delivery Settings	Submit	- II	
erms at any time	Keep My Current Delivery. Settings	submit> ating them on	Online Access	. You agree
erms at any time ed, you will be l	E and without notice by upda bound by such change. At th	ating them on the time of a cl	Online Access	. You agree Terms, yo
erms at any time ed, you will be l deliverv.	Keep My Current Delivery Settings e and without notice by upda bound by such change. At th	ating them on the time of a cl	Online Access hange to these	s. You agree Terms, yo
erms at any time ed, you will be l delivery.	Kees My Current Delivery Settings e and without notice by upda bound by such change. At th	ating them on the time of a cl	Online Access hange to these	. You agree Terms, yo
erms at any time ied, you will be l delivery.	Keep by Current Delivery Settings e and without notice by upda bound by such change. At th	submit> ating them on le time of a cl	Online Access hange to these	s. You agree Terms, yo
erms at any time ed, you will be l delivery. Iward Jones Cor	tees by Current Delivery Settings e and without notice by upda bound by such change. At th nsent to E-delivery	submit> ating them on le time of a cl	Online Access hange to these	s. You agree Terms, yo
erms at any time ed, you will be l delivery. Iward Jones Cor	Kees My Current Delivery Settings e and without notice by upda bound by such change. At th nsent to E-delivery	submit) ating them on a time of a cl	Online Access hange to these	s. You agree Terms, yo
erms at any time ed, you will be l delivery. Iward Jones Cor	Kees My Current Delivery Settings e and without notice by upda bound by such change. At th nsent to E-delivery	submit) ating them on e time of a cl	Online Access hange to these	a. You agree Terms, yo
erms at any time ed, you will be l delivery. dward Jones Cor	tees by Current Delivery Settings e and without notice by upda bound by such change. At th nsent to E-delivery	submit) ating them on le time of a cl	Online Access hange to these	s. You agree Terms, yo

A pop-up window will confirm your **preference change.**

Your preferences have been updated.

You will now receive all the selected documents electronically.

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