ENROLLING IN INVESTOR ACCESS

Quick Reference Guide

Before enrolling in Investor Access, make sure you have one of your last two Raymond James brokerage account statements – you will need your brokerage account number (shown on the statement) to enroll.

To enroll in Investor Access:

- Visit your financial advisor's website or RAYMONDJAMES.COM. Click the Account Login link in the upper-right corner of the screen. From RAYMONDJAMES.COM, click Account Login, then click the Investor Access link in the Account Login section.
- Click the Enroll in Investor Access link in the Investor Access Sign In section. (See Figure 1.)
- On the Personal Information screen, complete your personal information, enter your account number in the Brokerage Account Number field, and click the Next button. (See Figure 2.)
  - Note: In the Personal Information section, if you do not have a Social Security number or you used a different form of identification to open your account, click the Other Forms of Identification link, and select the ID type you used.
- On the Login ID and Password screen, do the following: (See Figure 3.)
  - Create a login ID and password; retype your password in the Confirm Password field.
  - Enter and verify your e-mail (in the corresponding fields).
  - Read the Terms & Conditions and then select the check box; click the Next button.

Figure 1. Enrollment link

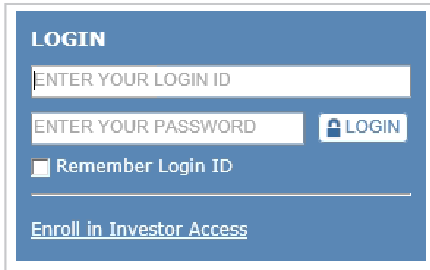


Figure 2. Personal information screen

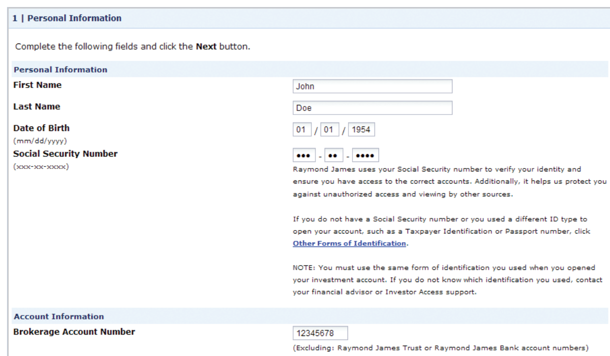
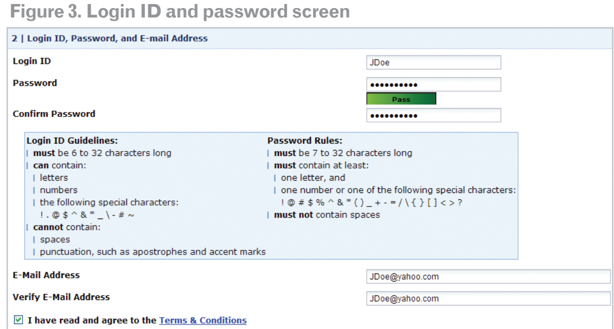


Figure 3. Login ID and password screen



- On the Security Questions screen, select three of the security questions and enter the answers in the corresponding fields; click the Next button. (See Figure 4.)
- On the Statement and Trade Confirmation Delivery screen, do the following: (See Figure 5.)
  - Select your preferred delivery method for the statements and trade confirmations for each of your accounts.
  - Enter your e-mail address in the Document Delivery E-mail Address field (optional).
  - Read the Online Statement and Trade Confirmation Notification Service Agreement and then select the check box; click the Next button; verify your delivery choices, and click the Next button.
- On the Shareholder Communications Delivery screen, do the following: (See Figure 6.)
  - Select the preferred delivery method for shareholder materials for each of your accounts and enter an e-mail address in the corresponding fields. Note: You cannot include multiple e-mail addresses for the same account.
- Read the online agreements, and then select the check boxes; click the Next button; verify your delivery choices, and click the FINISH and Launch Investor Access button. (See Figure 7.) Investor Access opens and displays your account information.

Figure 4. Security questions screen

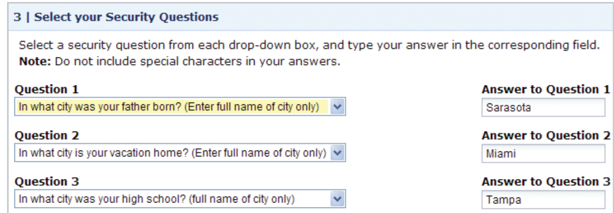


Figure 5. Statement and trade confirmation delivery screen

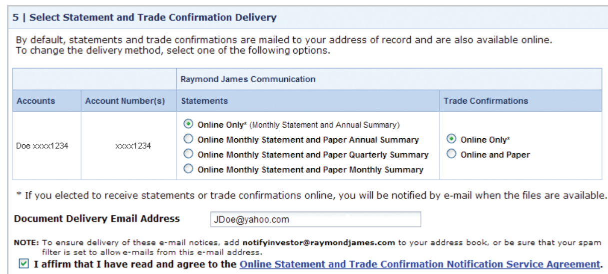


Figure 6. Shareholder communications delivery screen

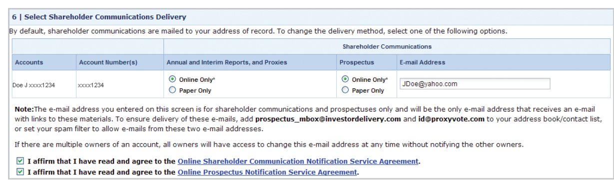
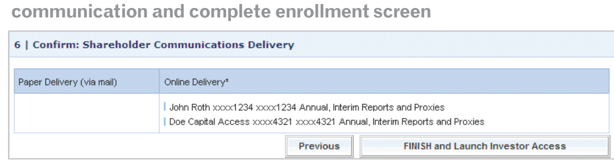


Figure 7. Confirm shareholder communication and complete enrollment screen



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