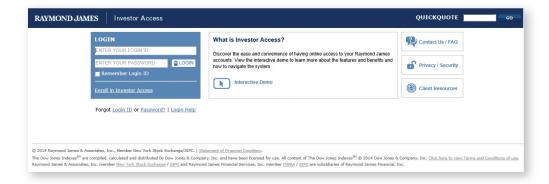
ENROLLING IN INVESTOR ACCESS

QUICK REFERENCE GUIDE



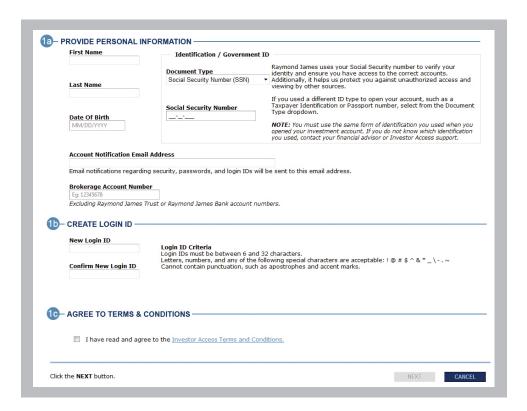
Enrolling in Investor Access, Raymond James' convenient and secure way to access your accounts online, is easy! The free, secure, online portal was designed to help you get the most out of your Raymond James accounts, bringing your day-to-day finances and long-term investments together in one place. But it does something even more important—it gives you the control you need to effectively monitor your assets from any computer or select mobile devices. Before you get started, you will need a recent Raymond James account statement—you'll need your brokerage account number (shown on the statement) to enroll.



Let's get started:

- Visit your financial advisor's website and click the Account Login link in the upper right corner of the screen.
 Or, go to raymondjames.com/investoraccess.
- Click the link that says Enroll in Investor Access

If you received an enrollment email from Raymond James saying that your financial advisor has already started your enrollment, click the link in the email to complete enrollment. You will be able to review the information entered by your advisor and make any needed changes.



1. PERSONAL INFORMATION

1a Enter your personal information and your account number in the corresponding fields.

NOTE: If you do not have a Social Security number or used a different form of identification to open your account, select the ID type you used by using the Document Type drop down.

- 1b Create a login ID, and confirm your new login ID.
- 1c Read the Terms and Conditions, and select the check box.

Click the Next button.

RAYMOND JAMES Investor Access QUICKQUOTE **Enrollment for Investor Access** Personal Information 2 Password & Security 3 Notifications & Delivery To complete the enrollment process, follow the 2 steps below and click the NEXT button. 2a- CREATE PASSWORD -The password strength meter helps you determine if your password is secure enough. New Password: Must include at least 7 characters not to exceed 32 characters Include a number or a special character (! @ # \$ % ^ & * () _ + - = / \ { } [] Confirm New Password: For a stronger password, use more than 8 characters, and include special characters. For example D@nny_BOy! 2b- SELECT SECURITY QUESTIONS -Select your security questions from the drop down boxes below and type your answers in the corresponding fields. Question 1 Answer 1 Note: Do not include special characters in your answer. Question 2 Answer 2 Select a Question Question 3 Answer 3 Select a Question Click the NEXT button. NEXT CANCEL **CLIENT SUPPORT** If you have questions or are having difficulties accessing your account information, please view our FAQs Page. Call Raymond James Investor Access support at 877-RJ-ACCESS (877-752-2237(2)) For technical support: Monday through Friday: 8 a.m. to 9 p.m. ET Saturday and Sunday: 8 a.m. to 5 p.m. ET

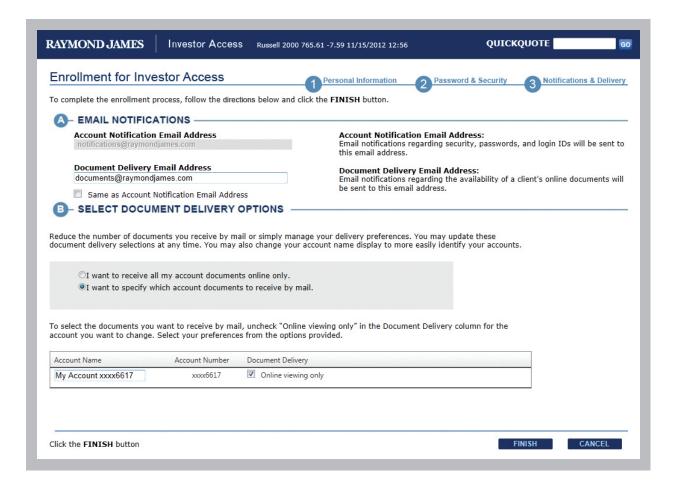
2. PASSWORD AND SECURITY

2a Create a password, and confirm your new password.

2b Select three of the security questions and enter the answers in the corresponding fields.

Click the Next button.

For client service, comments and suggestions: Monday through Friday: 8 a.m. to 7 n.m. FT



3. NOTIFICATIONS AND DELIVERY

- 3a Enter your Account Notification and Document Delivery email addresses in the appropriate fields.
- 3b Select your preferred delivery method for your account documents. You are defaulted to viewing your account documents online only. To specify which documents you would like sent to your address of record, select I want to specify which account documents to receive by mail and choose your preferences.

Click the **FINISH** button. Investor Access opens and displays your account information.

If you have questions,
contact your financial advisor or
Raymond James Investor Access
Support at 877.752.2237 or
investoraccess@raymondjames.com
from 8 a.m. to 9 p.m. ET,
Monday through Friday and
8 a.m. to 5 p.m. ET,
Saturday and Sunday.

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER
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