

ENROLLING IN INVESTOR ACCESS

QUICK REFERENCE GUIDE

The screenshot shows the Raymond James Investor Access login interface. At the top, there's a dark blue header with 'RAYMOND JAMES' on the left, 'Investor Access' in the center, and 'QUICKQUOTE' with a search bar and 'GO' button on the right. The main content area is white. On the left, there's a blue 'LOGIN' box with fields for 'ENTER YOUR LOGIN ID' and 'ENTER YOUR PASSWORD', a 'Remember Login ID' checkbox, and a 'LOGIN' button. Below this is a link to 'Enroll in Investor Access'. To the right of the login box is a section titled 'What is Investor Access?' with a paragraph describing the benefits of online access and a link to an 'Interactive Demo'. On the far right, there are three links: 'Contact Us / FAQ', 'Privacy / Security', and 'Client Resources'. At the bottom of the login box, there's a link for 'Forgot Login ID or Password?' and a 'Login Help' link. A small copyright notice is at the very bottom of the page.

RAYMOND JAMES | Investor Access | QUICKQUOTE GO

LOGIN

ENTER YOUR LOGIN ID

ENTER YOUR PASSWORD LOGIN

☐ Remember Login ID

[Enroll in Investor Access](#)

[Forgot Login ID or Password?](#) | [Login Help](#)

What is Investor Access?

Discover the ease and convenience of having online access to your Raymond James accounts. [View the interactive demo](#) to learn more about the features and benefits and how to navigate the system.

[Interactive Demo](#)

[Contact Us / FAQ](#)

[Privacy / Security](#)

[Client Resources](#)

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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.

RAYMOND JAMES®

LOGIN

ENTER YOUR LOGIN ID

ENTER YOUR PASSWORD

☐ Remember Login ID

LOGIN

Enroll in Investor Access

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.

1a- PROVIDE PERSONAL INFORMATION

First Name

Last Name

Date Of Birth

MM/DD/YYYY

Identification / Government ID

Document Type

Social Security Number (SSN)

Social Security Number

__-__-__

Account Notification Email Address

Brokerage Account Number

Eg: 12345678

1b- CREATE LOGIN ID

New Login ID

Confirm New Login ID

1c- AGREE TO TERMS & CONDITIONS

☐ I have read and agree to the [Investor Access Terms and Conditions](#).

Click the NEXT button.

NEXT

CANCEL

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.

Enrollment for Investor Access

1 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

Select a Question



Question 2

Select a Question



Question 3

Select a Question



Answer 1

Answer 2

Answer 3

Note: Do not include special characters in your answer.

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)

Hours

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

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

Enrollment for Investor Access

1

Personal Information

2

Password & Security

3

Notifications & Delivery

To complete the enrollment process, follow the directions below and click the **FINISH** button.

A EMAIL NOTIFICATIONS**Account Notification Email Address**

notifications@raymondjames.com

Document Delivery Email Address

documents@raymondjames.com

☐ Same as Account Notification Email Address**Account Notification Email Address:**

Email notifications regarding security, passwords, and login IDs will be sent to this email address.

Document Delivery Email Address:

Email notifications regarding the availability of a client's online documents will be sent to this email address.

B SELECT DOCUMENT DELIVERY OPTIONS

Reduce the number of documents you receive by mail or simply manage your delivery preferences. You may update these document delivery selections at any time. You may also change your account name display to more easily identify your accounts.

- ☐ I want to receive all my account documents online only.
☒ I want to specify which account documents to receive by mail.

To select the documents you want to receive by mail, uncheck "Online viewing only" in the Document Delivery column for the account you want to change. Select your preferences from the options provided.

Account Name	Account Number	Document Delivery
My Account xxxx6617	xxxx6617	<input checked="" type="checkbox"/> Online viewing only

Click the **FINISH** button

FINISH**CANCEL****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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