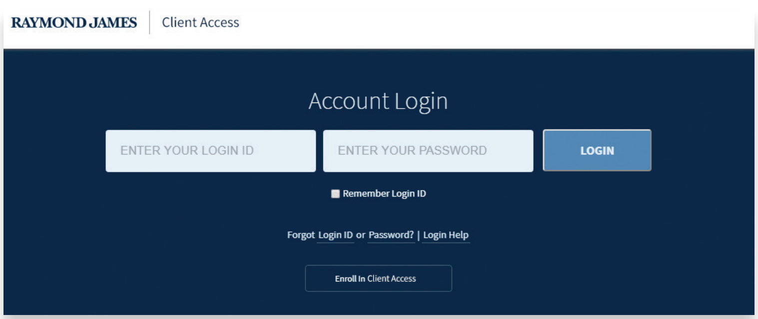
ENROLLING IN CLIENT ACCESS QUICK REFERENCE GUIDE

Client Access is your source for simple, secure access to your Raymond James account information on your computer or mobile device – it puts instant insight and control at your fingertips. To set up your free account, follow these simple steps.



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.

LET'S GET STARTED:

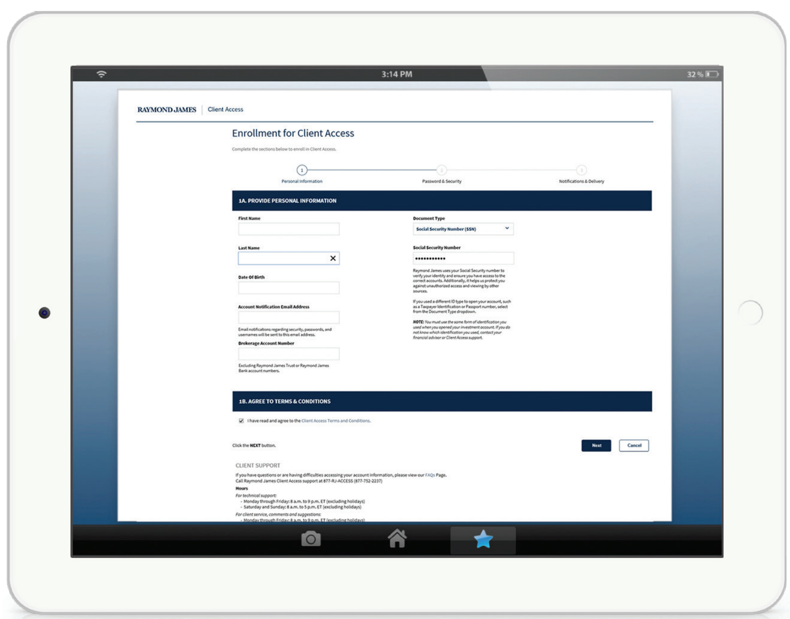
- Visit your financial advisor's website and click the **Account Login** link in the upper right corner of the screen. Or, go to raymondjames.com/clientaccess.
- Click the link that says **Enroll in Client Access.**

STEP 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 Read the Terms and Conditions, and select the check box.

Click the **Next** button.



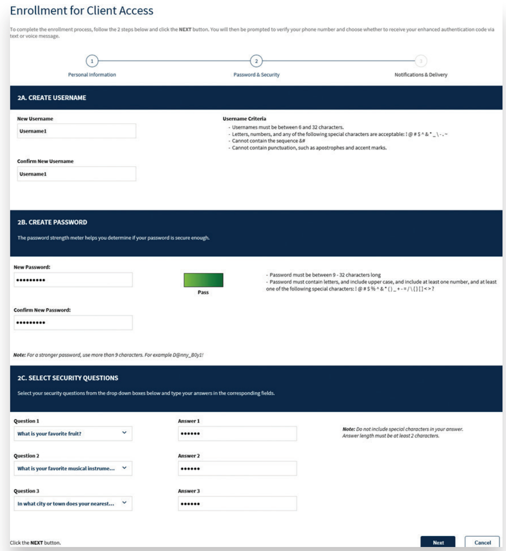
STEP 2 – PASSWORD AND SECURITY

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

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

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

Click the **Next** button. You will then be prompted to authenticate the phone number we have on file for you.

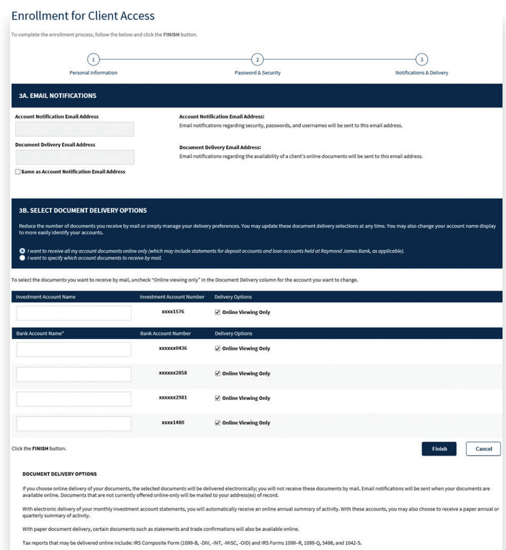


STEP 3 – NOTIFICATIONS AND DELIVERY

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. Client Access opens and displays your account information.



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

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 727.567.1000

RAYMONDJAMES.COM