

## 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.

### 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](http://raymondjames.com/clientaccess).
- Click the link that says **Enroll in Client 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.

### 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.

