

Adding External Accounts in Client Access

If the service is enabled by your client advisor, you can add external account data so that it appears on the Summary screen (Client Access's home page). Having external account information on the Summary screen, along with your Raymond James accounts, can assist you in attaining a net worth view.

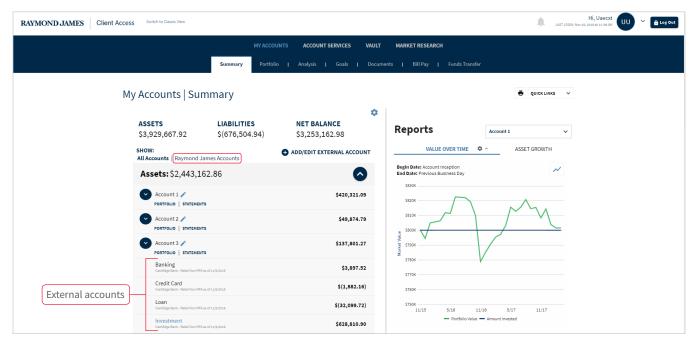
You can add two types of accounts:

- Accounts at external financial institutions The account balances are updated daily using a secure, automated feed.
- Offline accounts The account balances of offline accounts (assets and liabilities not available via online access) must be manually updated.

VIEWING EXTERNAL ACCOUNTS

When you access the My Accounts > Summary screen in Client Access, the default view lists both Raymond James accounts and any external accounts that have been added.

Click the **Raymond James Accounts** link to exclude external accounts that you have added.



ADDING EXTERNAL ACCOUNTS - FIRST TIME ACCESS

The first time you use the **Add/Edit External Account** link, a step to acknowledge and accept Terms and Conditions is included. (This step won't appear in subsequent use of the link, unless the Terms and Conditions change.)

To add external accounts for the first time:

- On the My Accounts > Summary screen, click the Add/Edit External Account link.
- 2. To continue, review and accept the Terms and Conditions and click the **Next** button.

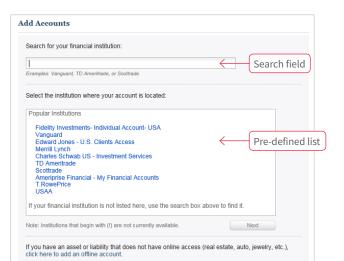
Note: If the Terms and Conditions are not accepted, the service cannot be used.

3. Follow the Add Accounts wizard to search for and select a financial institution or an offline account (asset or liability).

FINANCIAL INSTITUTION

- Follow the wizard to search for an institution (or select from a pre-defined list of popular institutions) and to add related accounts.
- As part of the wizard, enter the login credentials used to access the selected financial institution.
- If you need to add another financial institution to the list, click the **Select Another Institution** button.
- Click the **Next** button to move through the screens.
- The screens to the right illustrate two of the primary screens in the process.

My Accounts Sur	nmary	
		۵.
ASSETS	LIABILITIES	NET BALANCE
\$3,929,667.92	\$(676,504.94)	\$3,253,162.98
SHOW: All Accounts Raymond J:	ames Accounts	ADD/EDIT EXTERNAL ACCOUNT
Assets: \$2,443,10	52.86	٥
Account 1 PORTFOLIO STATEMENT	75	\$420,321.09



Add Accounts	
Enter your credentials for the selected financial institution below:	
SunTrust - Personal Banking User ID jdoe123 Password Re-enter Password Re-enter Password	SS
Select Another Institution button	
Select Another Institution Next	

OFFLINE ACCOUNT

- Click the **Offline Account** link at the bottom of the screen to add an asset or liability that is not available via online access, such as real estate.
- When prompted, select the offline account type and enter a name and a value for the offline account.
- Click the **Next** button when done.

	Add Accounts	Add Accounts
	Search for your financial institution:	Enter your credentials for the selected financial institution below:
	Examples: Vanguard, TD Ameritrade, or Sootrade	SunTrust - Personal Banking
	Select the institution where your account is located:	Lintps://www.suntrust.com/PersonalBanking
	Popular Institutions	User ID jdoe123
	Fidelity Investments- Individual Account- USA Vanouard	Password
	Edward Jones - U.S. Clients Access Merrill Lynch	Re-enter Password
	Charles Schwab US - Investment Services TD Ameritrade	•••••
	Scottrade Ameriprise Financial - My Financial Accounts T.RowePrice	
	USAA	
	If your financial institution is not listed here, use the search box above to find it.	
Offline	Note: Institutions that begin with (!) are not currently available. Next	
Account	If you have an asset or liability that does not have online access (real estate, auto, jewelry, etc.), click here to add an offline account.	Select Another Institution Next
link		

Note: After the accounts have been added and the wizard is closed, a slight delay may occur before the accounts appear on the My Accounts > Summary screen. A message in the lower right of the screen indicates the delay. Once processing takes place, the accounts appear in the list on the screen.

Loading Non-Raymond James Account(s)... X We're still loading your non-Raymond James account(s), and we will alert you when this is complete. Thank you for your patience.

ADDING EXTERNAL ACCOUNTS – AFTER FIRST TIME ACCESS

After the initial addition of external account information, you'll continue to use the **Add/Edit External Account** link, but the screen presentation is somewhat different. For the steps to add external accounts after initial access, see the following section, Managing External Accounts.

MANAGING EXTERNAL ACCOUNTS

After first-time access, take the following steps to add external accounts, or to edit or delete an existing account:

 On the My Accounts > Summary screen, click the Add/Edit External Account link. The Manage Accounts screen opens listing the financial institutions and related accounts, along with any offline accounts, that have been added.

	ADD/EDIT EXTERNAL ACCOUNT		
	MANAGE ACCOUNTS		^
	Expand accounts to view/edit account nicknames and settings.		
	🔝 CashEdge Test Bank (Agg) - Retail Non 2FA		😑 🛈 🗔
	CashEdge Bank - Retail Non MFA 10 Days Ago		😑 😌 🚍
External	▶ Banking	\$3,898	
financial	Credit Card	\$1,882	
institution	▶ Loan	\$32,100	
with related	► Mortgage	\$173,952	
accounts	Outside Investment	\$479,388	
	Offline Account		
Offline	► House	\$500,000	
accounts	► Jewelry	\$50,000	
	ADD/EDIT EXTERNAL ACCOUNT		

2. On the Manage Accounts screen:

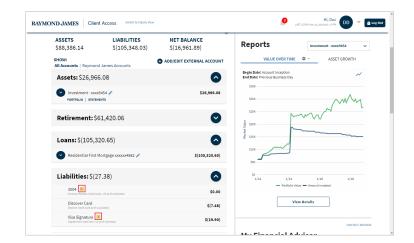
- Add a new financial institution by clicking the Add/Edit External Account link at the top or bottom of the screen.
- Add an account by clicking the **plus** sign to the right of the institution name and following the instructions in the wizard.
- Delete a financial institution or an offline account by clicking the **Delete icon** for that row.
- Edit an institutional account name or type by clicking the **Arrow** icon to expand the account information. Make your changes and click the **Save** button.
- Edit an offline account name, type or balance by clicking the **Arrow** icon to expand the account information. Make your changes and click the **Save** button.

	Click this icon in to the fin- institutio		e financ	ancial	
	ADD/EDIT EXTERNAL ACCOUNT MANAGE ACCOUNTS Expand accounts to viewledit account nicknames and settings.			^	
Click the arrow icon	(1) CashEdge Test Bank (Agg) - Retail Non 2FA		8 0 3	1	
to expand	() CashEdge Bank - Retail Non MFA 10 Days Ago	\$3.898		1	
the account information for editing.	ACCOUNT NAME: ACCOUNT TYPE: Banking Banking Account: Savings Account Note: Changing account type will delete all transaction history we've retrieved for the account is Cancel 3	eo far.			
	Credit Card	\$1,882			
	> Loan	\$32,100			
	➤ Mortgage	\$173,952			
	Outside Investment ADD/EDIT EXTERNAL ACCOUNT	\$479,388		• •	

RESOLVING ALERTS

Alerts related to external accounts typically indicate an issue such as a password that has been updated at an outside institution. (To clear such an alert, the password for the external account that was updated at the outside institution must also be updated in Client Access.)

To resolve an alert, click the yellow **Alert I** icon shown with the account and follow the instructions on the screen that appears.





A DIVISION OF RAYMOND JAMES

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