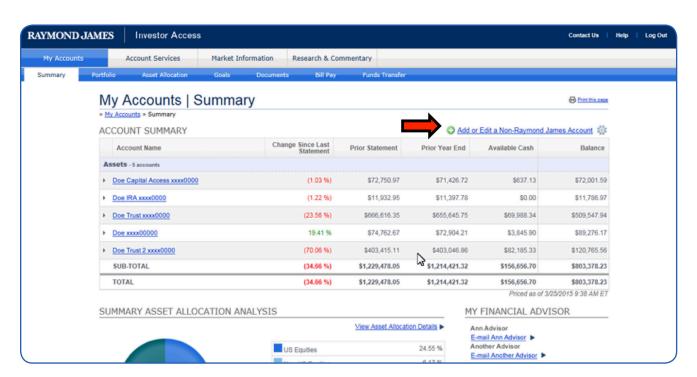


Account Aggregation in Investor Access

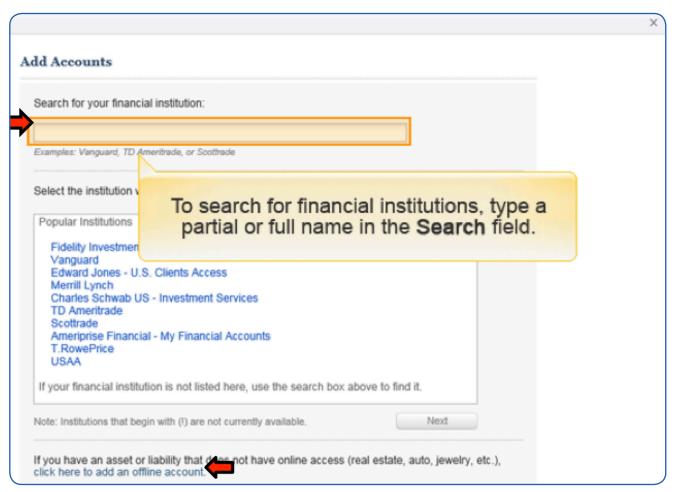
You are now able to load your outside accounts into Investor Access with your Raymond James accounts. This makes keeping track of all accounts easier for both clients and planners.

If you are not yet enrolled in Investor Access, you can follow this quick guide to set it up: https://myrjnet.rjf.com/MarketingMaterials/Marketing%20Materials/ALL/Brochures/Investor-Access-QRG.pdf

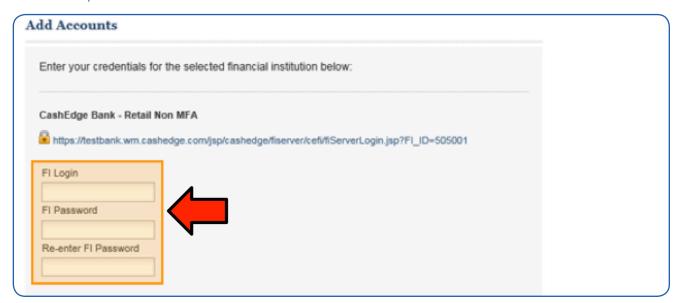
Once in Investor Access, you will click "Add or Edit a Non-Raymond James Account" on the Summary tab:



You can then type your financial institution into the Search field shown. You can also add other assets/liabilities that do not have online access:

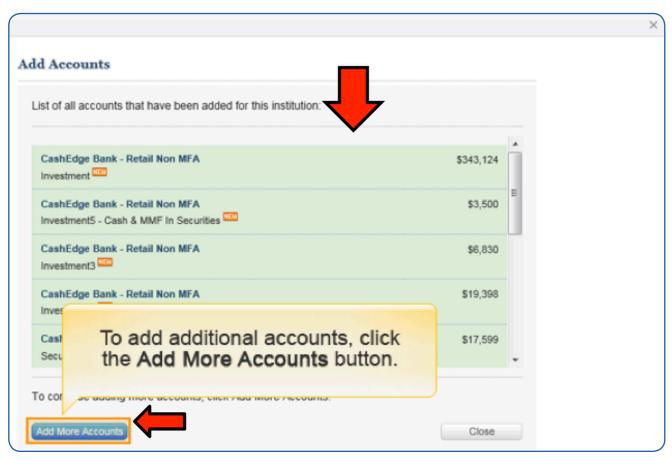


You will then log-in with the corresponding log-in credentials from your specific financial institution:

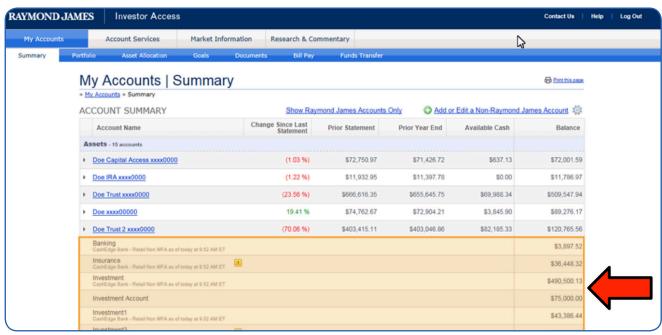


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Your accounts from that institution will be shown, and you will have the option to go back and add more accounts from other institutions:

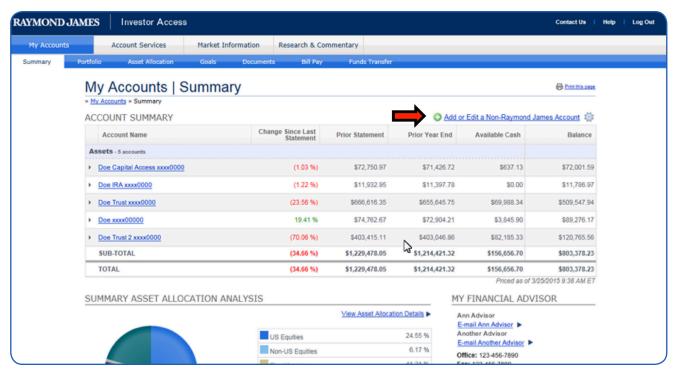


Once you have finished adding your external accounts, they will appear on the home page below your Raymond James accounts:

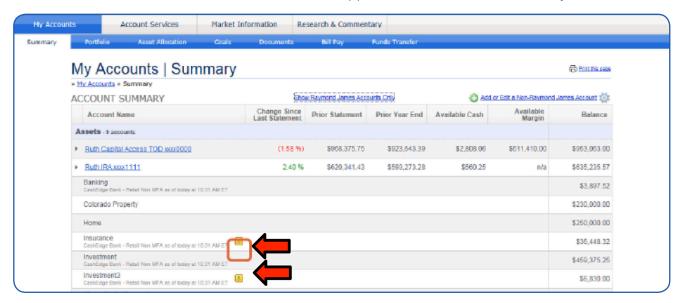


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Once accounts have been added, you can manage them by clicking the same link that guided you towards adding them:



If there is a problem with one of your accounts, such as a password that has been updated at an outside institution, you will be notified by the yellow Alert icon. Click the yellow Alert icon and follow the instructions that appear on the screen to resolve any issues:



RJ Account Aggregation is a very simple way to allow you and your financial planner to see a more complete and accurate representation of all accounts. If you have any questions regarding the Account Aggregation process, please do not hesitate to contact us at (248) 948-7900.