

Adding Outside Accounts in Investor Access

If the service is enabled by your financial advisor, you can add non-Raymond James account data so that it appears on the Summary screen (Investor Access's home page). Having non-Raymond James 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 outside 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 non-Raymond James Accounts

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

Click the **Show Raymond James Accounts Only** link to exclude non-Raymond James accounts that you have added.

Account Name	Change Since Last Statement	Prior Statement	Prior Year End	Available Cash	Available Margin	Balance
Assets - 9 accounts						
Ruth Capital Access TOD xxx0000	(1.58 %)	\$968,375.75	\$923,543.39	\$2,808.06	\$611,410.00	\$953,063.00
Ruth IRA xxx01111	2.40 %	\$620,341.43	\$593,273.28	\$560.25	n/a	\$635,235.57
Banking						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$3,897.52
Colorado Property						
Home						\$250,000.00
Insurance						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$36,448.32
Investment						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$459,375.25
Investment3						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$6,830.00
MoneyMarketAccount						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$4,633.52
SUB-TOTAL	(0.03 %)	\$1,588,717.18	\$1,516,816.67	\$3,368.31	\$611,410.00	\$2,579,483.18
Liabilities - 3 accounts						
Credit Card						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$(1,882.16)
Loan_201						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$(32,099.72)
Mortgage_INSTL						
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET						\$(173,952.27)
SUB-TOTAL		\$0.00	\$0.00	\$0.00	\$0.00	\$(207,934.15)
TOTAL	(0.03 %)	\$1,588,717.18	\$1,516,816.67	\$3,368.31	\$611,410.00	\$2,371,549.03

Adding non-Raymond James Accounts – First Time Access

The first time you use the **Add or Edit a Non-Raymond James 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 non-Raymond James accounts for the first time:

1. On the My Accounts > Summary screen, click the **Add or Edit a Non-Raymond James Account** link.



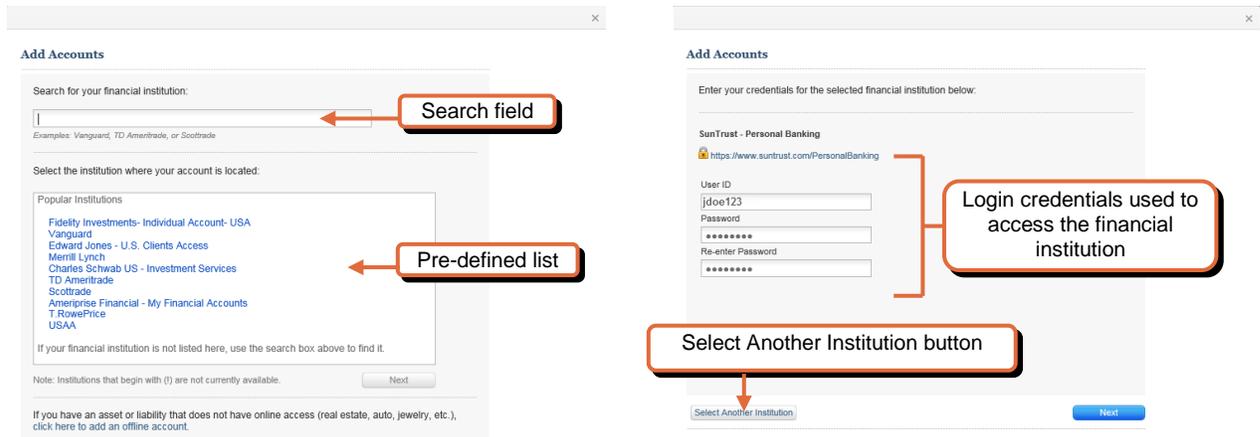
2. To continue, review and accept the Terms and Conditions and click the **Next** button.
3. Follow the Add Accounts wizard to search for and select a financial institution or an offline account (asset or liability).

- **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.

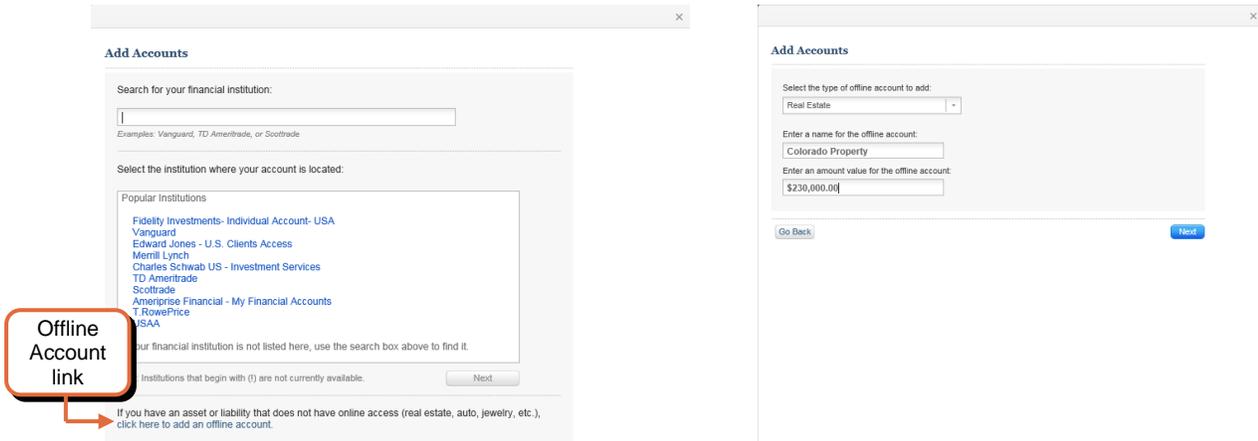
The screens below illustrate two of the primary screens in the process.



- **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.



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.



Adding non-Raymond James Accounts – After First Time Access

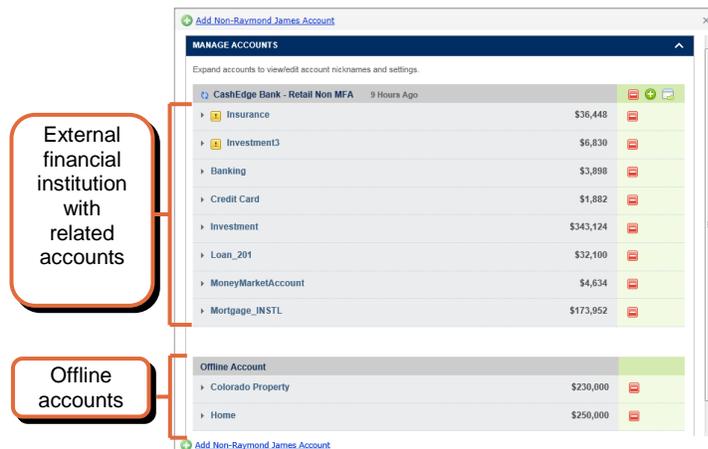
After the initial addition of non-Raymond James account information, you'll continue to use the **Add or Edit a Non-James Account** link, but the screen presentation is somewhat different. For the steps to add non-Raymond James accounts after initial access, see the following section, Managing non-Raymond James Accounts.

Managing non-Raymond James Accounts

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

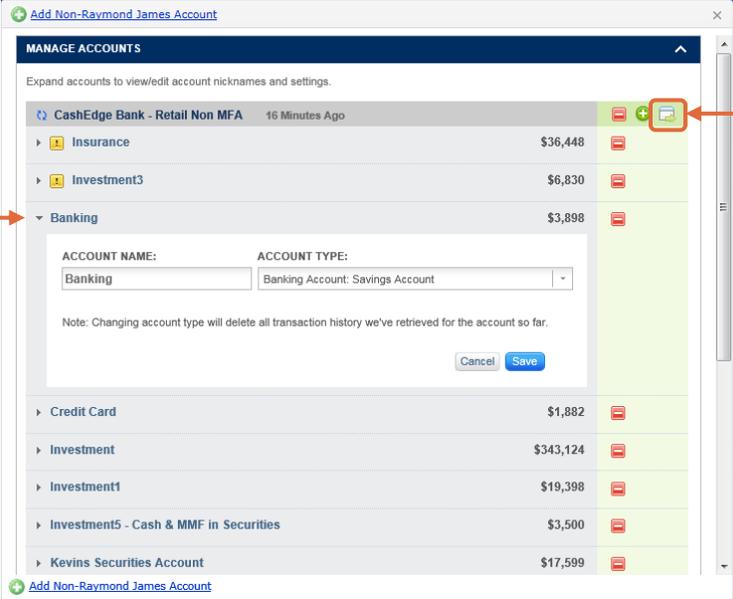
1. On the My Accounts > Summary screen, click the **Add or Edit a Non-Raymond James Account** link.

The Manage Accounts screen opens listing the financial institutions and related accounts, along with any offline accounts, that have been added.



2. On the Manage Accounts screen:

- Add a new financial institution by clicking the **Add Non-Raymond James 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 the **arrow icon** to expand the account information for editing.

Click this icon to log into the financial institution.

Account Name	Balance	Action
CashEdge Bank - Retail Non MFA	16 Minutes Ago	
Insurance	\$36,448	
Investment3	\$6,830	
Banking	\$3,898	
ACCOUNT NAME: Banking ACCOUNT TYPE: Banking Account: Savings Account		
Credit Card	\$1,882	
Investment	\$343,124	
Investment1	\$19,398	
Investment5 - Cash & MMF in Securities	\$3,500	
Kevins Securities Account	\$17,599	

Resolving Alerts

Alerts related to non-Raymond James 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 Investor Access.)

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

My Accounts		Account Services	Market Information	Research & Commentary				
Summary	Portfolio	Asset Allocation	Goals	Documents	Bill Pay	Funds Transfer		
My Accounts Summary							Print this page	
» My Accounts » Summary								
ACCOUNT SUMMARY Show Raymond James Accounts Only Add or Edit a Non-Raymond James Account								
Account Name	Change Since Last Statement	Prior Statement	Prior Year End	Available Cash	Available Margin	Balance		
Assets - 9 accounts								
▶ Ruth Capital Access TOD xxxx0000	(1.58 %)	\$968,375.75	\$923,543.39	\$2,808.06	\$611,410.00	\$953,063.00		
▶ Ruth IRA xxxx1111	2.40 %	\$620,341.43	\$593,273.28	\$560.25	n/a	\$635,235.57		
Banking								
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET							\$3,897.52	
Colorado Property							\$230,000.00	
Home							\$250,000.00	
Insurance								
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET							\$36,448.32	
Investment								
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET							\$459,375.25	
Investment3								
CashEdge Bank - Retail Non MFA as of today at 10:31 AM ET							\$6,830.00	
MoneyMarketAccount							\$1,623.52	

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