

# CLIENT ACCESS SITE

## HOW TO SIGN UP FOR CLIENT ONLINE ACCESS

1. Type <https://rjcs.raymondjames.ca/> into your browser.
2. Enter your email address, and click **Start** to begin the registration process.

RAYMOND JAMES® CORRESPONDENT SERVICES | Client Access

FRANÇAIS

Have access? Please sign in

ENTER YOUR USERNAME  Remember Username

ENTER YOUR PASSWORD

SIGN IN

Forgot Password? Forgot Username? Login Help

Need access? Please register

1 Email Verification 2 Personal Information 3 Password & Security

ENTER YOUR EMAIL

START

Follow the instructions in the email we'll send you to continue registering for access

3. Log in to your email and locate an email with the subject **Client Access — Email Verification Required | Accès des clients — Vérification d'adresse courriel requise**.
4. Open the email, and click **Verify Email Address** to confirm your email.

RAYMOND JAMES \*\* Client Access

La version en français est disponible ci-dessous

Thank you for choosing to register for online Client Access to your Raymond James account(s). Our secure online Client Access provides you with timely and convenient access to your portfolio statements, trade confirmations and tax receipts, investment research, and more.

Before continuing, please note that you will be required to confirm a number of personal details as part of our secure online access registration process. If you experience difficulties with the registration process, please contact your Advisor.

If you decide not to continue with your online registration, you can safely ignore this email.

To continue, please click on the link below to verify your email address.

Verify Email Address


Thank you for choosing Raymond James Ltd. for your investment needs.

Someone performed an action at the Client Access site using Google Chrome on Windows, which resulted in this email being sent to you.  
Note: This is an automatically generated email. Replies to this message are not monitored or answered.

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5. You will be delivered to the page **Client Access Registration**, where you can complete Step 2 of the registration process by submitting your personal details.

RAYMOND JAMES  Client Access

### Client Access Registration

Complete the sections below to register for Client Access.

1 Email Verification — 2 Personal Information — 3 Password & Security

#### YOUR PERSONAL DETAILS

|                      |  |  |   |
|----------------------|--|--|---|
| Your First Name      | Social Insurance Number                |  |   |
| <input type="text"/> | <input type="text" value="nnn"/>       | <input type="text" value="nnn"/>         | <input type="text" value="nnn"/>          |
| Your Last Name       | Date of Birth                          |  |   |
| <input type="text"/> | Day<br><input type="text" value="dd"/> | Month<br><input type="text" value="mm"/> | Year<br><input type="text" value="yyyy"/> |

Raymond James uses your Social Insurance Number to verify your identity and to ensure you have access to the correct accounts. Additionally, it helps us to protect you against unauthorized access to your accounts.

*NOTE: The information submitted in this section must match what was provided to your Advisor when you opened your account.*

#### YOUR ADVISOR'S DETAILS

*Note: If you do not know the first five characters of your account number, or if you have any questions, contact your Advisor.*

6. Once you have entered your information, review and agree to the **Client Access Terms & Conditions** and click **Next**.



#### TERMS AND CONDITIONS

I have read and agree to the Client Access Terms & Conditions

Click the **Next** button to submit your Personal Information for review.

**NEXT** CANCEL

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## CLIENT ACCESS SITE

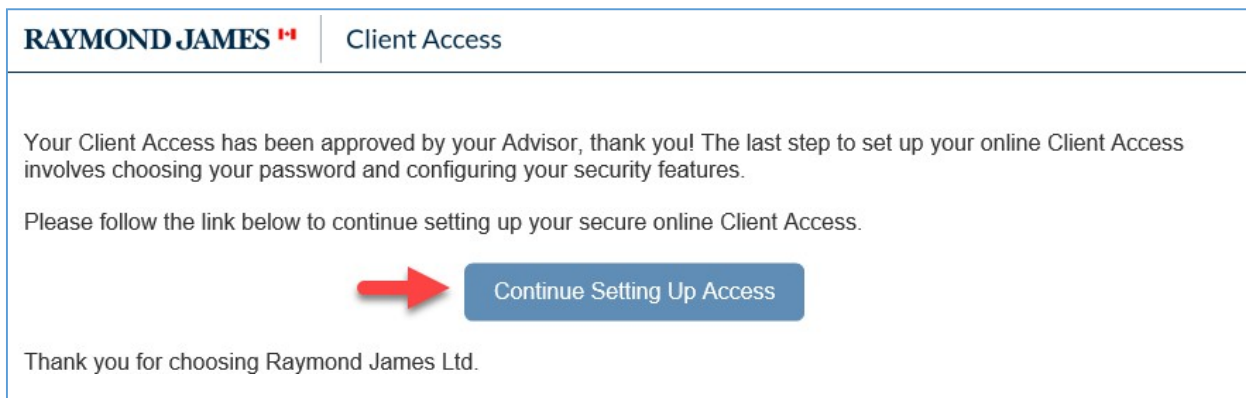
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7. Once your registration has been approved, you will be notified by email confirming that you can now set up a password and sign in.

*Note: Requests can take up to three business days to be approved.*

8. Once activated, you will receive an email notification prompting you to complete your security setup and sign in. Click the **Continue Setting Up Access** link in the email to begin.



9. Select a password, and at least three security challenge questions.
10. Select one phone number that is on-file with Raymond James from the **Your Telephone Number** dropdown to begin setting up Two-Factor Authentication.
11. Choose whether you want your first code by **Text Message** or **Voice Call**.
12. Click **Send Code** to send a code to the selected phone number.

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## HOW TO SIGN UP FOR CLIENT ONLINE ACCESS

### TWO-FACTOR AUTHENTICATION

Your Telephone Number

Number ending in 0713

Receive Verification Code By

Text Message

Voice Call

SEND CODE

Click the Send Code button above to begin the Phone Number verification process.

Help protect your personal information by adding a phone number to enable Two-Factor Authentication. When you or someone attempts to sign in, we will send a verification code to your phone. The verification code must be entered to complete the sign-in process.

Notes:

- The number you provide must already be registered with your account. If you haven't yet registered your phone number, please contact your Advisor.
- Message and data rates may apply.

FINISH CANCEL

13. Enter the code you receive into the **Verification Code Required** popup, and then click **Verify Code**.
14. Once your code has been verified, click **Finish** to complete your Client Access setup.
15. You can now log in to Client Access by visiting <https://rjcs.raymondjames.ca/>

*Note: Please remember to note your log-in name and password. For security reasons, your Advisor will not be able to provide you with the password you have created.*