

ADDING ACCOUNTS TO MY NET WORTH

JANNEY ONLINE ACCESS

Your Janney account information will already be uploaded and available. In order to add outside accounts into MY NET WORTH, you must provide the security information (login, password, and in some cases PIN numbers) for each of your outside accounts. MY NET WORTH will use this information to retrieve your account balance(s) and transaction information. All account security information will be encrypted and securely stored.

STEPS TO ADD YOUR ACCOUNTS

Step 1: You must be logged into Janney Online Access.

Click on **My Net Worth tab**. Below that, choose **Add & Manage Accounts tab**.

Then choose **+ Add A New Account**.

The screenshot shows the Janney online access interface. The top navigation bar includes the Janney logo and several menu items: Portfolio & Accounts, Statements & Documents, Research & Education, Money Transfer/Bill Pay/Rewards, Notifications, Prof, and My Net Worth. The 'My Net Worth' menu item is circled in orange. Below the navigation bar, the 'Add & Manage Accounts' tab is also circled in orange. The main content area displays 'SYNCED ACCOUNTS' with a dropdown menu for 'INSTITUTION'. A table lists the account details for 'Janney Montgomery Scott', showing a value of \$16,607,318.29 and a history from 2 weeks ago. A '+ ADD A NEW ACCOUNT' button is circled in orange in the top right corner of the account list area.

ACCOUNT PORTFOLIO(S)	VALUE	HISTORY FROM DATE	STATUS
Janney Montgomery Scott 10 Portfolios	\$16,607,318.29	2 weeks From 2016-02-04	Good

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Step 2: You will go quickly through a few screens. **Enter** the name of the institution in the search box. For example, search for “ABC”. **Click** on the institution that matches the type of account you hold.

Step 3: **Enter** your User ID and password credentials for the outside account you wish to add, and then **click** the Sync Account button.

Step 4: For Multi-Factor Authentication, you will need to complete another step. **Enter** additional password authentication information, such as a PIN number or an answer to a question. Then **click** the Submit MFA button. Your data will now begin the sync process.

It may take up to 24 hours for data to be displayed in MY NET WORTH.

For Assistance:

Please contact the Online Services department for further assistance. Please have your Janney account information ready.

Phone: 888.882.0012
Email: OnlineServices@janney.com
Monday to Friday: 7 AM–9 PM EST
Saturday, Sunday, and Holidays: 9 AM–4 PM EST

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