HOW TO AUTHORIZE A USER FOR ACCOUNT ACCESS

To get started, click the Interested Parties navigation item under the Profile tab. Once there, look for the Authorize Account Access function shown below. Click the Grant access button to initiate the authorization process.

After you click the Grant access button, you will be prompted to agree to the Terms & Conditions.

After agreeing to the Terms & Conditions, you will be required to fill out information about the guest you wish to grant access to your accounts, including name, email, phone, and relationship. Please note: The phone number entered on the next screen must be accurate. It will be used during the PIN verification process in order to allow the guest to set up a unique password for Authorized Account Access.

Once you enter the required information, you can select the accounts that you want the guest to have access to.

After confirming your request, an email will be generated to the guest with the information required to log in and set up their password.

Setting up a password requires a PIN verification that uses the phone number entered during the registration process.

Once the guest receives the notification, they will be prompted to go to a login page that resembles the Online Access login page. However, the guest user will not have access to any content except for Statements, Confirmations, and Tax documents.
HOW TO REMOVE OR EDIT ACCOUNT ACCESS AUTHORIZATION

All authorized user profiles entered by clients can be edited by accessing the same Account Access section of the website. If a guest misplaces their email notification, they can use the Resend Notification function in the Account Access Authorization section of the website to generate a duplicate registration email.

<table>
<thead>
<tr>
<th>Name</th>
<th>Accounts</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe, Accountant</td>
<td>12345678, 12345679, 12345680</td>
<td>Resend</td>
</tr>
</tbody>
</table>

READY TO START USING ONLINE ACCESS?

For further assistance, you may contact the Online Services Department. Please have your Janney account information ready.

Phone: 888.882.0012
Email: OnlineServices@janney.com
Monday through Friday: 7AM – 7PM EST
Saturday, Sunday, and Holidays: 7AM – 12PM EST