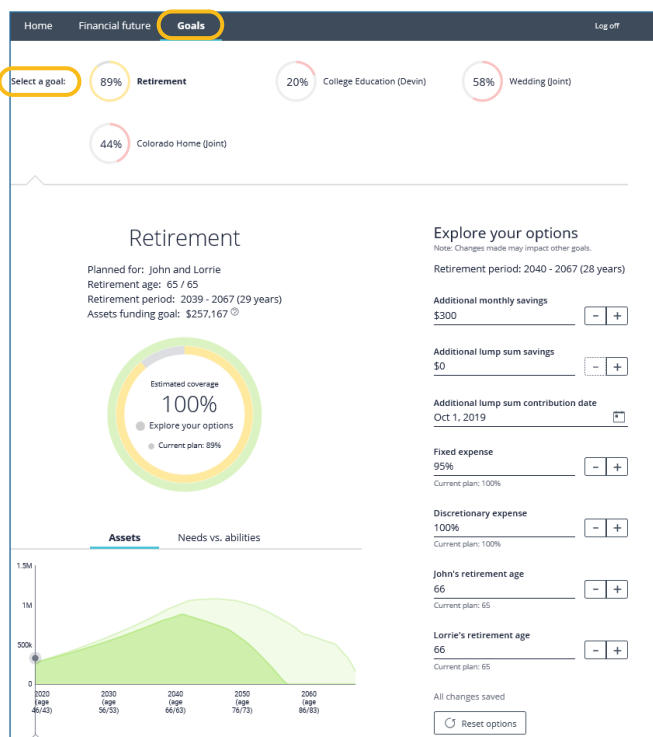


# ACCESS YOUR FINANCIAL PLAN THROUGH ONLINE ACCESS

Access your financial plan for easy reference, and download it for your convenience using the desktop version of Online Access, Janney’s secure online portal. In addition, a Financial Planning Calculator is available so you can explore what your financial plan would look like when you change variables—such as savings rate or time horizon—and see how your likelihood of success could be impacted.

## HERE’S HOW TO ACCESS YOUR FINANCIAL PLAN ON ONLINE ACCESS

- Log on to Online Access at [MyJanney.com](http://MyJanney.com), then click on the **Financial Planning** tab. You will see PDF links for as many financial plans as you have completed. Click on the link(s) to download the document(s).
- To view the results of your latest financial plan through the Financial Planning Calculator, click on the **Goals** area on the Financial Planning page.
- When a plan has multiple goals, as shown, clicking on the goals in the **Select a Goal** area will move that goal into the calculator.
- To create “what if” scenarios for a particular goal in your current financial plan, use the slider bars to change variables.
- You can only change variables in the calculator under **Explore Your Options** (under **Goals** tab).
- While you cannot save the scenarios you explore in the calculator, you can print them out to share and discuss with your Janney Financial Advisor.
- If you have more than one approved plan, ask your Financial Advisor to publish the plan you want to see and it will load into the calculator.
- A financial plan will appear in Online Access 24 hours after it is reviewed and approved by your Financial Advisor.



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## NEED ASSISTANCE?

If you have trouble accessing your financial plan, you may contact the Online Services team. Please have your Janney account information ready.

**Phone:** 888.882.0012

**Email:** [OnlineServices@janney.com](mailto:OnlineServices@janney.com)

**Monday through Friday:** 7AM – 7PM EST

**Saturday, Sunday, and Holidays:** 7AM – 12PM EST

## WORKING WITH JANNEY

By establishing a relationship with a Janney Financial Advisor, we can build a tailored financial plan and make recommendations about solutions that are aligned with your best interest and unique needs, goals, and preferences. Contact us today to discuss how we can put a plan in place designed to help you reach your financial goals.

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on [www.janney.com/crs](http://www.janney.com/crs) which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.

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