
DOCUMENT VAULT HELPS YOU MANAGE ALL YOUR IMPORTANT DOCUMENTS

Stay organized by keeping all of your financial, household, and personal documents in one safe place with Document Vault, which allows you to store and access documents between you and your Janney Financial Advisor. This tool is available as a complimentary service to all Janney clients who are registered users of Online Access. You can access this portal on your desktop or using the Janney Mobile App.

DOCUMENT VAULT FEATURES:

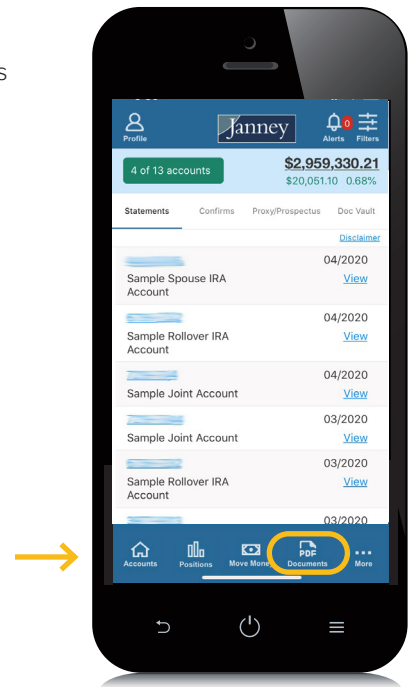
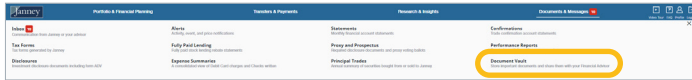
- Enhanced security through Online Access, including email and text login authentication
- Ability to share and store most common digital file types (PDFs, MS Word & Excel, Google Docs, and many others)
- Easy-to-use email functionality to securely send and receive messages to and from your Financial Advisor
- Option to create and name new folders to organize and store your digital financial documents

TYPES OF INFORMATION YOU CAN STORE IN YOUR DOCUMENT VAULT:

- Banking documents (credit card, bank account(s), lines of credit, mortgage)
- Retirement documents (Social Security, 401(k) plans, pension(s), IRAs, deferred compensation)
- Investment documents (brokerage accounts, mutual fund accounts, education savings accounts, annuity contracts, executive compensation and stock options)
- Insurance documents (life, homeowner's, health/Medicare, disability, long-term care, auto)
- Business documents (incorporation, financials, account data)
- Home management documents (home maintenance providers, rental property details, deeds, titles, appraisals)
- Family, gifting, and estate documents (beneficiaries for non-Janney accounts, will, trusts, powers of attorney, charities, pre/post-nuptial agreements, separation/divorce/custody agreements, guardians, birth/death/marriage certificates, passports, Social Security cards, citizenship papers, military records)

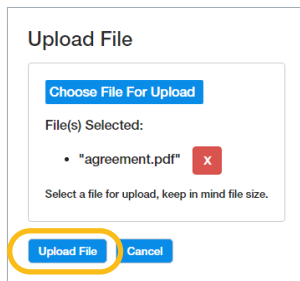
HOW TO ACCESS DOCUMENT VAULT:

- Log on to Online Access at www.MyJanney.com. Once there, click the Documents & Messages tab and select Document Vault. If using the Mobile App, click on the Documents icon, then Document Vault.



STORE FINANCIAL DOCUMENTS:

- Click on the **Financial Documents** folder or create and name a new folder.
- Select **Upload File**.
- Select **Browse**, find the document you want from the appropriate drive, and click **Open** to attach your digital document.
- Click **Submit** to save and store your file.



JANNEY'S ONLINE SERVICES TEAM IS HERE TO HELP

Contact our Online Services team with questions, or if you'd like additional support. To allow for more efficient assistance, please have your Janney account information handy.

Phone: 888.882.0012

Email: OnlineServices@janney.com

Hours: Monday—Friday: 7AM – 7PM EST
Saturday, Sunday, and Holidays: 7AM – 12PM EST