


GUEST ACCESS VIA ONLINE ACCESS

Easily authorize family members, your accountant, CPA, or any guest to access your online statements, confirmations, and tax forms through Online Access, your secure Janney account portal. You can authorize or remove access to your information at any time.

HOW TO AUTHORIZE A USER FOR ACCOUNT ACCESS

To get started, log on to Online Access (www.MyJanney.com), go to the Profiles icon  and select Interested Parties and Guest Access from the menu. Once there, look for the Authorize Account Access function shown below. Click Grant Access to initiate the authorization process.

Authorize Account Access
Entitle another individual (ex. tax accountant, lawyer, etc.) separate but limited read-only access to your Statements, Confirms, or Tax documents.

Account Access Authorization

Name	Account(s)	Status

Grant access

You will be prompted to agree to the Terms & Conditions.

Terms & Conditions for allowing account access

By clicking "Agree", you agree and authorize the third party(ies) indicated above to access information on the Janney accounts you have designated on an information-only basis. You understand that you may modify or revoke this authorization at any time. You agree and acknowledge that this authorization shall remain in effect until Janney receives notice of a change, revocation or death and has had a reasonable amount of time to act upon such notice. I agree to indemnify Janney Montgomery Scott LLC (and its employees, agents and officers) harmless from any liability arising out of providing the designated third party(ies) with access to the account information as authorized by you above.

I agree to the terms & conditions.

Agree Cancel

After agreeing to the Terms & Conditions, fill out information about the guest you wish to grant access to your accounts, including name, email, phone, and relationship. Be sure the phone number entered on the next screen is accurate, as it will be used during the PIN verification process for your guest.

Authorize Guest Access

Setup Guest • Select Accounts • Validate and accept terms • Verify identity and submit

Enter the Guest's Details

First name
Last name
Email address
Confirm email address
Phone number
Relationship
Please select

Next Cancel

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

Authorize Guest Access

Setup Guest • Select Accounts • Validate and accept terms • Verify identity and submit

Select accounts (Only accounts eligible for authorized access are shown).

Select all Accounts

<input type="checkbox"/> Account 1 Retirement Account 1234-5678	<input type="checkbox"/> Account 2 UTMA Account 1234-5679	<input type="checkbox"/> Account 3 529 Plan 1234-5698	<input type="checkbox"/> Account 4 Joint Account 1234-5688
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Next Back Cancel

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

Setting up a password requires a PIN verification, using the phone number you entered during the registration process.

Your guest will then be prompted to go to a login page that resembles the Online Access login page. Your guest will not have access to any content except for Statements, Confirmations, and Tax documents.

Login Verification

For Your Protection

LOGIN CREDENTIALS VERIFICATION METHOD AUTHENTICATION

Secure Login


Username
Password

Forgot Password?

Submit

HOW TO REMOVE OR EDIT ACCOUNT ACCESS AUTHORIZATION

You can update any authorized-user profile by accessing the same Account Access section where you first granted access. If a guest misplaces the email notification, visit the Resend Notification function in the Account Access Authorization section of the website to generate a duplicate registration email.

Name	Account(s)	Status
John Doe, Accountant	12345678, 12345679, 12345688	Enabled Status <input type="button" value="Resend notice"/> 

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