

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.

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 advisor
- Option to create and name new folders to organize and store your digital financial documents

FOLLOWING ARE SOME OF THE TYPES OF INFORMATION YOU CAN STORE IN YOUR DOCUMENT VAULT:

This free feature is available to all Janney clients who are registered users of Online Access. Simply log in to Janney Online Access, click on the [Statements & Documents](#) tab, and select [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).

DOCUMENT VAULT:

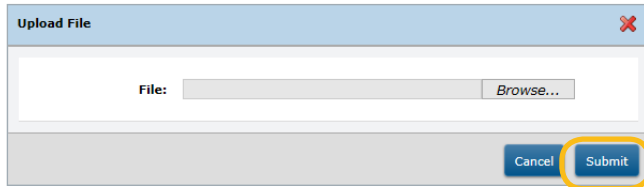
- Log on to Online Access at www.MyJanney.com. Once there, click the Documents & Messages tab and select Document Vault.

The screenshot shows the Janney Online Access navigation bar with the following tabs: Portfolio & Planning, Transfers & Payments, Research & Insights, and Documents & Messages (which has a red notification badge with the number 2). Below the navigation bar, a grid of document categories is displayed. The 'Document Vault' category is highlighted with a yellow rounded rectangle. The categories and their descriptions are as follows:

Inbox 2 Communication from Janney or your advisor	Alerts Activity, event, and price notifications	Statements Monthly financial account statements	Confirmations Trade confirmation account statements
Tax Forms Tax forms generated by Janney	Fully Paid Lending Fully paid stock lending rebate statements	Proxy and Prospectus Required disclosure documents and proxy voting ballots	Performance Reports Quarterly portfolio performance reports
Disclosures Investment disclosure documents including form ADV	Expense Summaries A consolidated view of Debit Card charges and Checks written	Principal Trades Annual summary of securities bought from or sold to Janney	Document Vault Store important documents and share them with your Financial Advisor

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.



The image shows a screenshot of a web-based 'Upload File' dialog box. The dialog has a light blue header with the text 'Upload File' and a red 'X' close button. Below the header is a white area containing a text input field labeled 'File:' followed by a 'Browse...' button. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a yellow circle.

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