


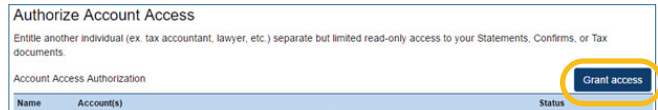
AUTHORIZE TRUSTED CONTACTS TO RECEIVE ACCOUNT DOCUMENTS

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 client portal. You can authorize or remove access to your information at any time.

HOW TO AUTHORIZE A USER FOR ACCOUNT ACCESS

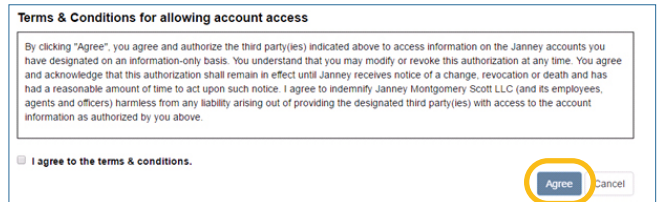
1. To get started, log on to Online Access at www.MyJanney.com, and select, go to the Profiles icon  at the top right of the landing page, and select **Interested Parties & Guest Access** from the menu.

Once there, look for the Authorize Account Access function shown below. Click **Grant Access** to initiate the authorization process.



The screenshot shows a form titled "Authorize Account Access". Below the title is a brief instruction: "Entitle another individual (ex. tax accountant, lawyer, etc.) separate but limited read-only access to your Statements, Confirms, or Tax documents." Below this is a section for "Account Access Authorization" with a table with columns "Name", "Account(s)", and "Status". A "Grant access" button is highlighted with a yellow circle in the top right corner.

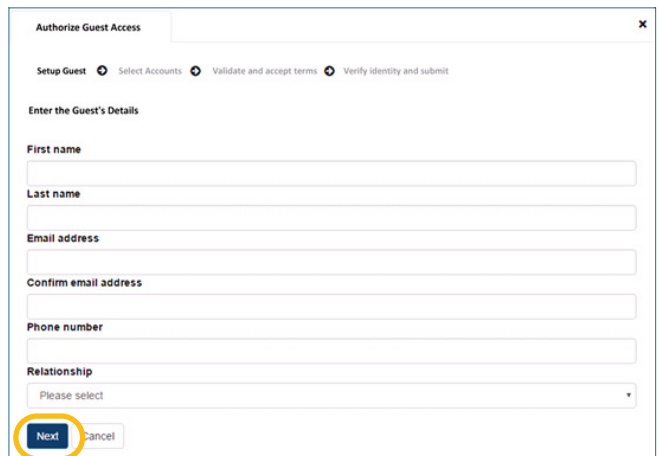
2. You will be prompted to agree to the **Terms & Conditions**.



The screenshot shows a form titled "Terms & Conditions for allowing account access". It contains a paragraph of legal text: "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." Below the text is a checkbox labeled "I agree to the terms & conditions." and an "Agree" button, which is highlighted with a yellow circle.

3. 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 is accurate, as it will be used during the PIN verification process for your guest.

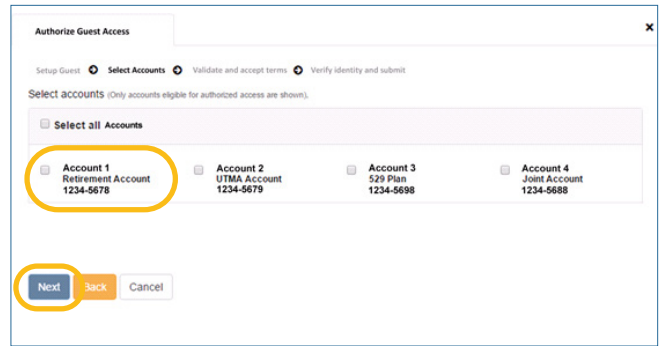
As a best practice, we recommend providing a phone number which can receive TEXT/SMS messages to allow your guest to access a PIN verification message.



The screenshot shows a form titled "Authorize Guest Access". It has a progress bar with four steps: "Setup Guest", "Select Accounts", "Validate and accept terms", and "Verify identity and submit". Below the progress bar is a section titled "Enter the Guest's Details" with several input fields: "First name", "Last name", "Email address", "Confirm email address", "Phone number", and "Relationship" (a dropdown menu with "Please select" as the current selection). A "Next" button is highlighted with a yellow circle at the bottom left.

4. Once you enter the required information:

- Select the account(s) you want the guest to access and select **Next**.
- Review the information provided to validate and accept terms. Select **Next** to continue.
- Read the Terms & Conditions, and click **Accept**.
- Verify your identity by receiving a PIN verification code via call or text and select **Next**.
- When this is complete, you will see your guest's status updated to **Enabled**.




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

In order for your guest to set up an Online Access Guest Login and Password, they will need to verify their identity via PIN verification, using the phone number or email you entered during registration.

Your guest will then be prompted to log into the Online Access Guest site at <https://guest.myjanney.com>. Please note, your guest will not have access to any content except for Statements, Confirmations and Tax Documents for the account(s) you entitled them to view.

HOW TO REMOVE OR EDIT ACCOUNT ACCESS AUTHORIZATION

1. To remove or update your Guest Access Authorization, navigate to the **Profile** tab and select **Interested Parties & Guest Access**.
2. From here you can remove users by updating their status by selecting **Disabled** from their **Status**, or remove the user by selecting the red **X** button.
3. To edit your guest's access or contact information, select **Edit** from the **Account(s)** column. You can also select **Resend Notification** to regenerate an invitation to your guest or view your trusted contact's username.

Name	Account(s)	Status	
John Doe, Accountant	12345678, 12345679, 12345688	Enabled (Data)	Resend notification 

ARE THERE REGISTRATION INSTRUCTIONS I CAN SHARE WITH MY TRUSTED CONTACT?

Instructions for Online Access Guest are available for your trusted contacts from your Financial Advisor, or can be found online, [here](#).

NEED ASSISTANCE?

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

WORKING WITH JANNEY

For more information about Janney, please see Janney's Relationship Summary (Form CRS) on 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.

By establishing a relationship with us, 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.

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