

GUEST ACCESS TO JANNEY'S ONLINE ACCESS PORTAL

Janney clients can authorize their trusted contacts to view their electronic client statements, confirmations, and tax forms through Online Access, Janney's client portal.

HOW TO LOG IN AND REGISTER FOR ONLINE ACCESS GUEST

To get started, a Janney client must enroll you for guest access through their Online Access client portal. Once registered, you will receive an Online Access Guest registration link with your username included. The registration link will be sent to the email address provided by the Janney client at the time of enrollment.

After you received the registration link to <https://guest.myjanney.com/>, you can populate your username and continue to registration.

You will be prompted to create a password and are required to verify your identity with a PIN Verification sent to the email or phone number provided by the Janney client at the time of enrollment.

Once logged in, you will have access to the Janney client's statements, confirmations and tax forms for each account you've been granted access to receive. Navigate between these document types using the top navigation bar. Select the applicable account(s) using the **Show Account** dropdown.

From Online Access Guest, you can view, download, and print shared documents.

Sample Online Access Guest Landing Page:

The screenshot shows the Janney Online Access Guest Landing Page for Statements. The page features a dark blue header with the Janney logo on the left, "Welcome," and a "Logout" button on the right. Below the header, there is a navigation bar with "Show account(s):" set to "All accounts" and tabs for "Statements", "Confirmations", and "Tax Forms". On the right side of this bar are "Print" and "Refresh" buttons. The main content area is titled "Statements" and includes a sub-header: "On this page, you can find Janney monthly financial account statements." Below this, there is a "Year:" dropdown set to "2022", a "Merge Selected & Download" button, and a "Disclaimer" button. A table lists investment statements for 2022, with columns for "Account", "Account Name", "Date", and "Download". The table contains seven rows, all for "Investments" from January to July 2022. A footer bar at the bottom contains links for "Terms & Conditions", "Privacy Policy", "Data Security", "Financial Information", "Business Continuity", "Investment Disclosures", "Careers", "Pricing", "Disclaimer", and "Zoom".

<input type="checkbox"/>	Account	Account Name	Date	
<input type="checkbox"/>		Investments	Jul 2022	Download
<input type="checkbox"/>		Investments	Jun 2022	Download
<input type="checkbox"/>		Investments	May 2022	Download
<input type="checkbox"/>		Investments	Apr 2022	Download
<input type="checkbox"/>		Investments	Mar 2022	Download
<input type="checkbox"/>		Investments	Feb 2022	Download
<input type="checkbox"/>		Investments	Jan 2022	Download

I DID NOT RECEIVE A REGISTRATION LINK

A Janney client must enroll you for Online Access Guest through their Online Access client portal. They can resend a registration link from their Online Access portal by navigating to the [Profile](#) tab and selecting [Interested Parties & Guest Access](#). From here, the Janney client can select [Resend Notification](#) to regenerate your registration link. Please confirm the Janney client has entered the appropriate email and phone number for you. As a best practice, we recommend the Janney client enter a mobile phone number which can receive TEXT/SMS messages to allow for a PIN verification message during your registration process.

I FORGOT MY PASSWORD TO ONLINE ACCESS GUEST

If you forget your password to Online Access Guest, select the [Forgot Password?](#) button on the Online Access Guest log in screen.

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

Depending on your financial needs and personal preferences, you may opt to engage in a brokerage relationship, an advisory relationship or a combination of both. Each time you open an account, we will make recommendations on which type of relationship is in your best interest based on the information you provide when you complete or update your client profile.

When you engage in an advisory relationship, you will pay an asset-based fee which encompasses, among other things, a defined investment strategy, ongoing monitoring, and performance reporting. Your Financial Advisor will serve in a fiduciary capacity for your advisory accounts.

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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