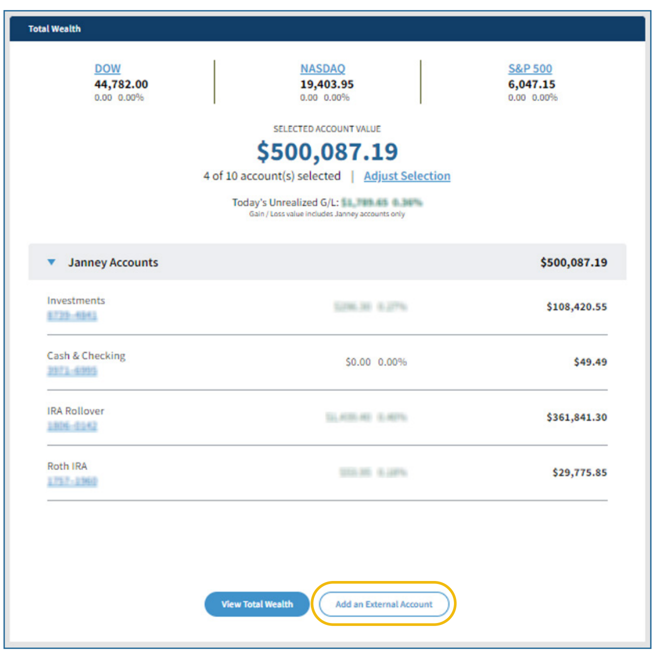
AGGREGATE YOUR INDIVIDUALLY HELD SECURITIES USING MY NET WORTH

Janney's Online Access My Net Worth tool provides clients with a seamless way to aggregate individually held securities, offering a comprehensive view of their financial portfolio. By linking individually-held securities, you can efficiently track and manage their net worth in one centralized platform.

STEPS TO LINK YOUR SECURITIES TO ONLINE ACCESS

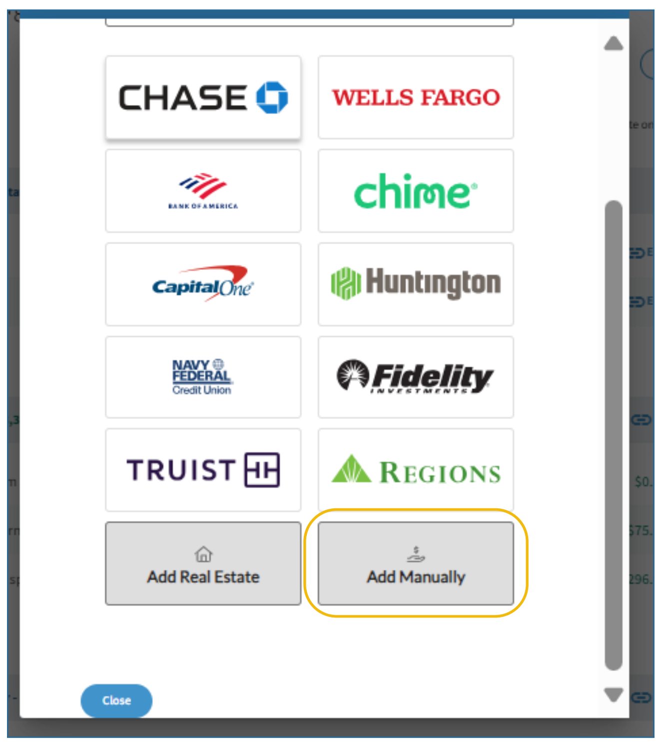
Individual securities aggregated using My Net Worth will be displayed with real-time updates to their security pricing. This tool is designed to simplify financial oversight, enabling informed decisions through real-time updates and detailed insights. Follow these steps to begin using the tool and optimize your financial management experience.

Step 1: Log into Online Access and select **Add an External Account** from the Total Wealth Module.

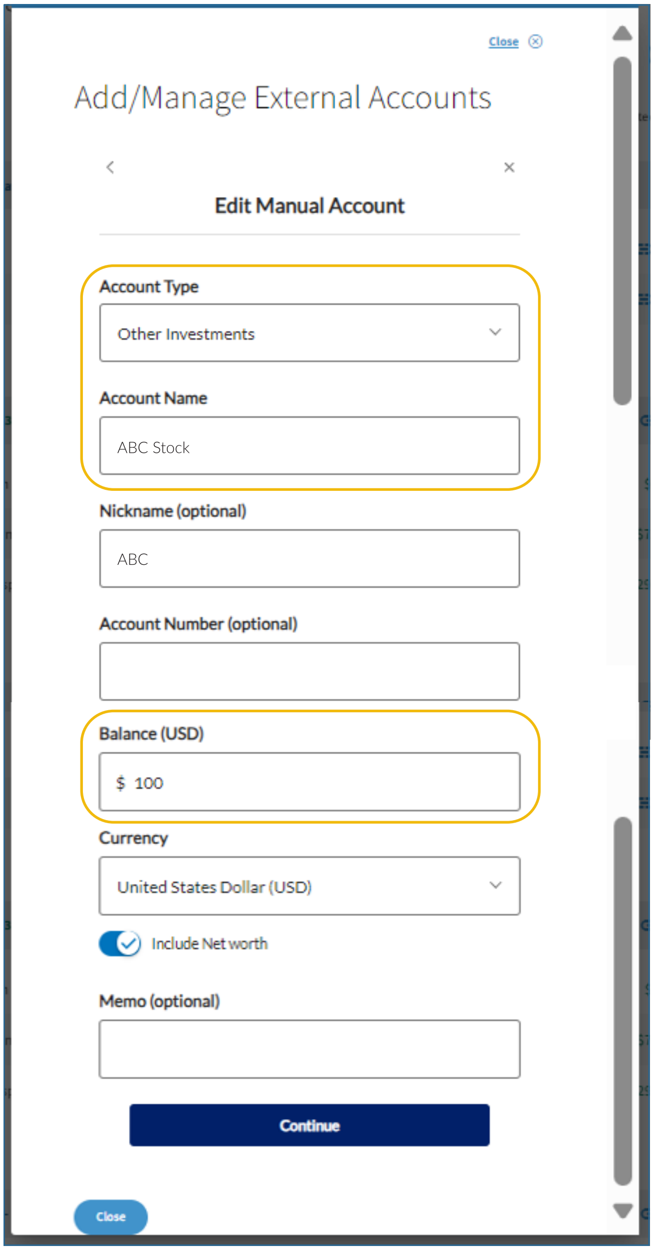


Step 2: Select **Add Accounts.**

Step 3: Select **Add Manually.**



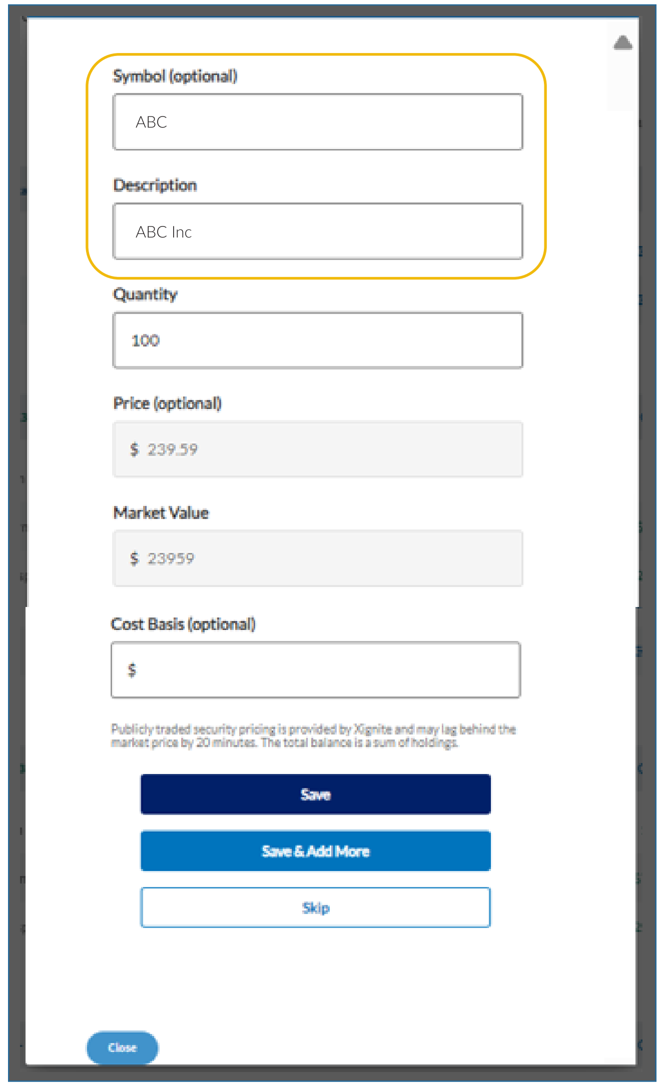
Step 4: Select **Other Investments** from the **Account Type** dropdown menu and type in descriptors to identify the **Account Name, Nickname** or **Account number.**



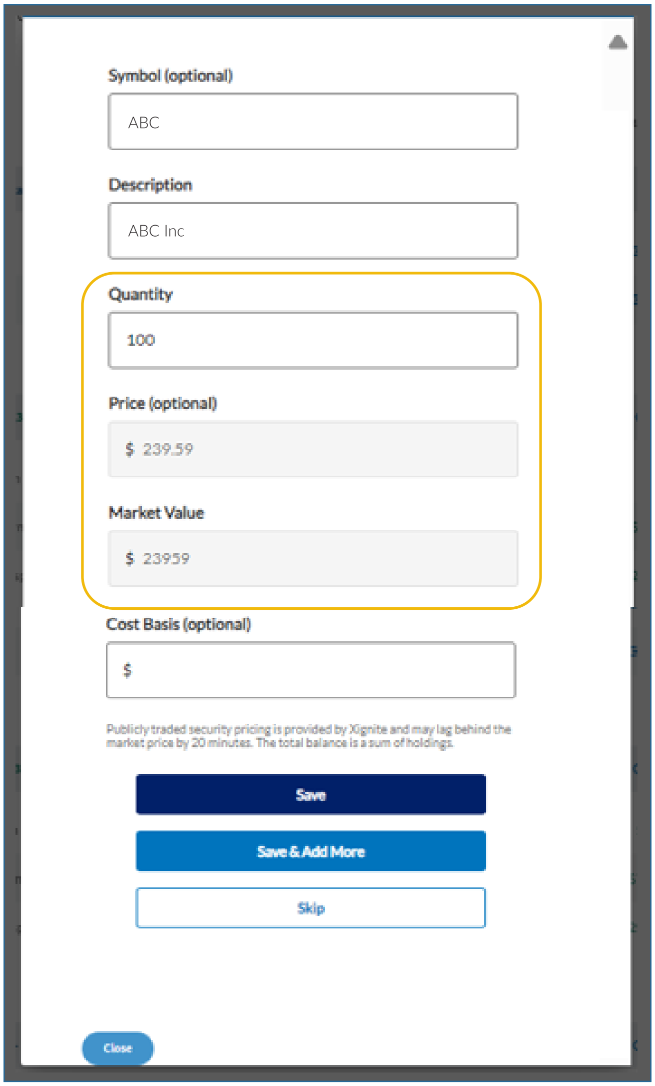
Step 5: Fill in the approximate **Balance ($)** of the security. Note: Once the symbol is populated on the next screen, the market value will be auto-populated.

Step 6: Select **Continue.**

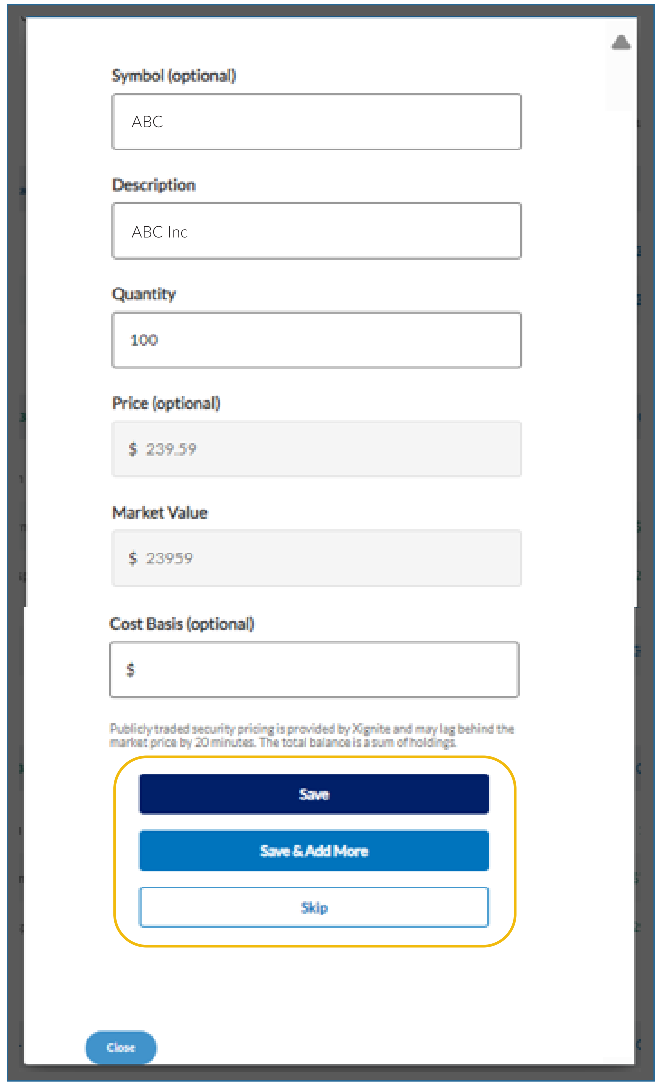
Step 7: Type in the security's **Symbol,** and the **Description** field will auto-populate.



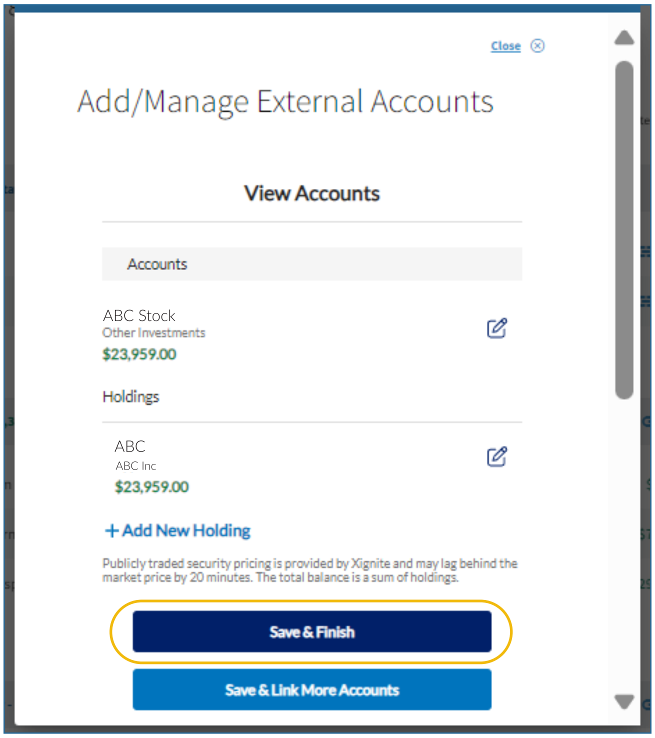
Step 8: Type in the **Quantity** of the security you own, and the **Price** and **Market Value** fields will auto-populate, using the last close of business pricing.



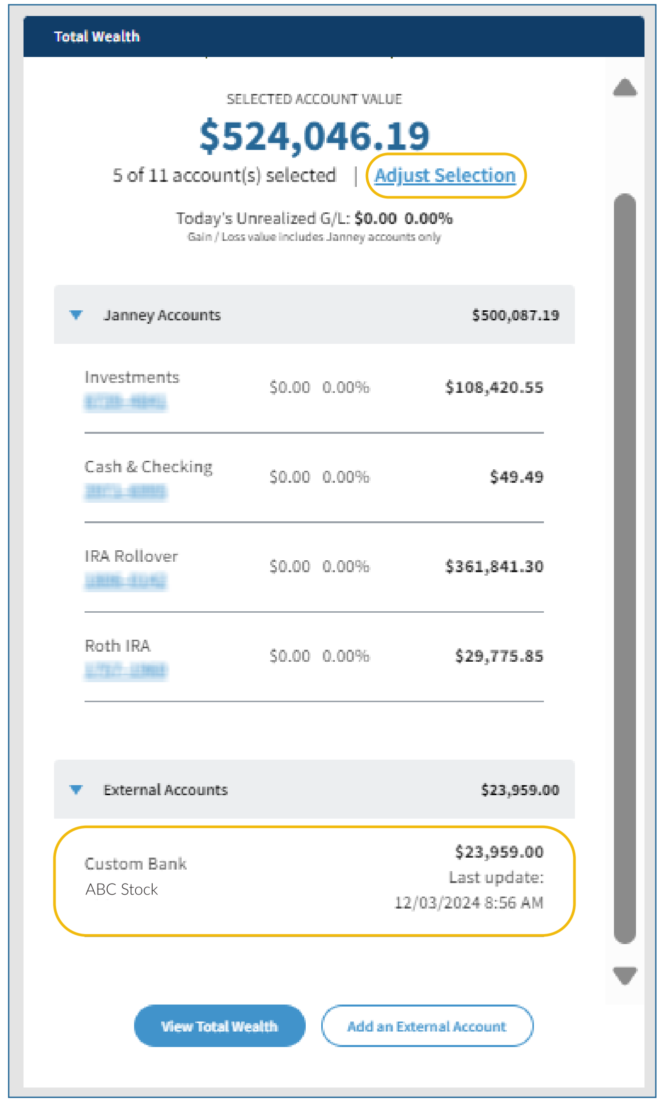
Step 9: Select **Save.** If you wish to add more individually-held securities, select **Save & Add More.**



Step 10: Once completed, a preview of the security will be displayed. Select **Save & Finish.**



Step 11: Once complete, your security will be available using the **Adjust Selection** button. Individual securities will be shown under the **External Account** sub-heading.



NEED ASSISTANCE?

For further assistance, contact the Online Services team. 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, as well as the fees and costs associated with those services, 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.

If you engage in a brokerage relationship, you will buy and sell securities on a transaction basis and pay a commission for these services. Our recommendations for the purchase and sale of securities will be based on what is in your best interest and reflect reasonably available alternatives at that time. If 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 relationships.

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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