How to Sign Up for Raymond James Client Site | Quick Reference Guide

The Raymond James Ltd. (RJL) client site gives clients the option to securely access their RJL account(s) online.

Click here to access Client Resources.

Before You Start!

Contact your Advisor

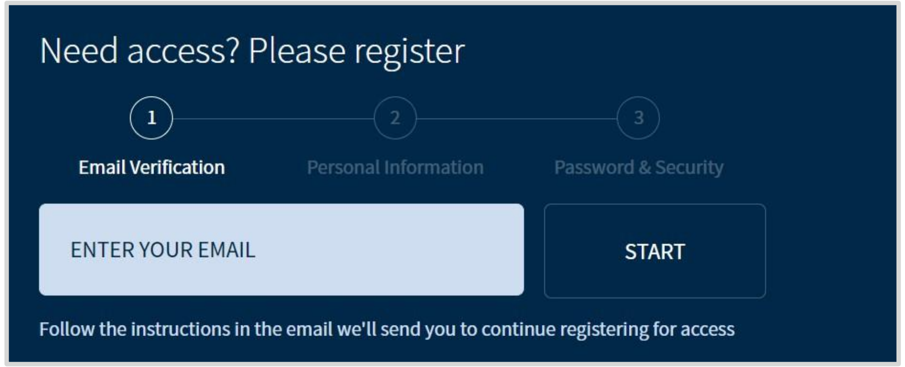
to confirm all steps and information that will be required to complete your online registration, including:

- All **Client IDs** (accounts) that you want access to online.
- The **Username, Email address** and **Phone Number** that you will use to access your account(s) online.
- Online registration steps for a **Corporate Account** (if applicable).

Client Access Registration

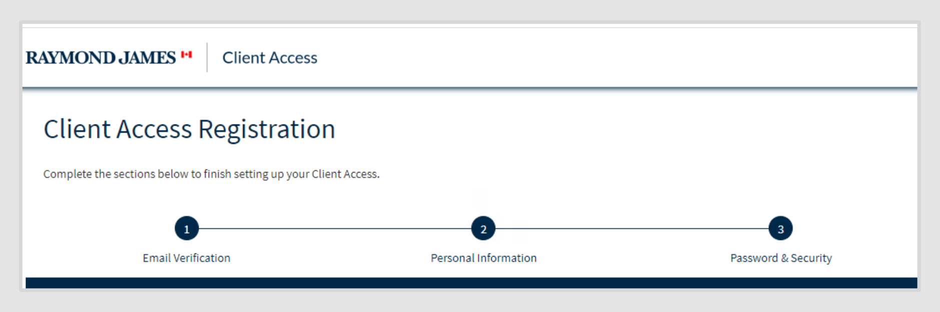
A. Go to *https://client.raymondjames.ca*.

B. In the ***Need access? Please register*** section, **Enter Your Email Address** and then click **Start**.



C. A ***Client Site — Email Verification Required*** email notification is sent to your email address. Click the **Verify Email Address** button in the email notification.

D. Complete the **Client Access Registration** page:



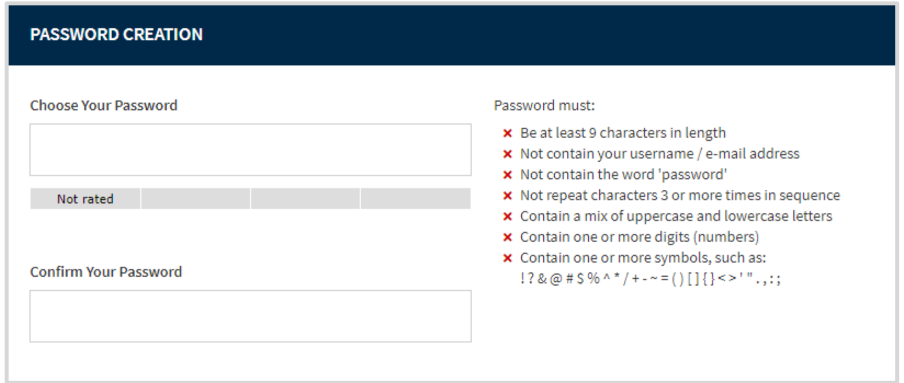
- **First and Last Name**
- **Date of Birth**
- **Branch Location**
- **Advisor's First and Last Name**
- **New Username:** Must be between 6-30 characters in length, and can contain letters, numbers and symbols.
- **Client IDs:** If you are requesting access to more than one Client ID, list any Joint Client ID first, and separate Client IDs with spaces, not punctuation (ex. 9Z123 AZ1ZZ 1X1X1).
- **Terms and Conditions:** Review and accept the Client Site Terms & Conditions.

Important: After you click Next at the bottom of the page, your registration request will be submitted to your Advisor for review. Once your Advisor approves the registration, you will receive an email notification prompting you to complete your security setup.

Password & Security Setup

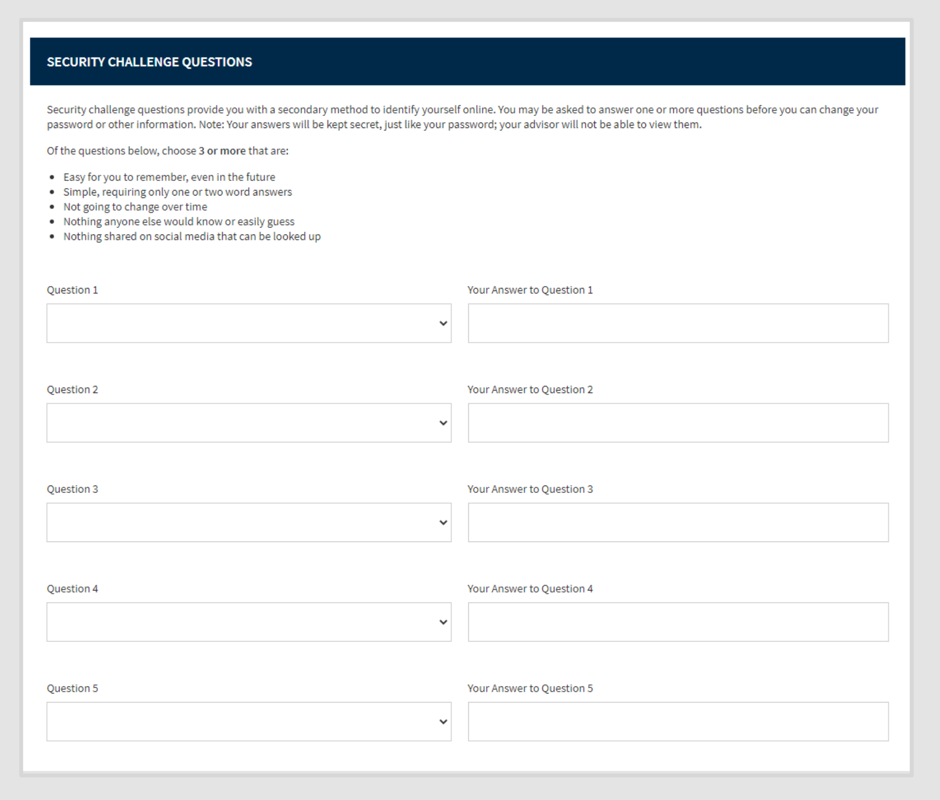
A. Open the ***Client Access — Password & Security Setup*** notification email, and click **Continue Setting Up Access.**

Important: This link expires in 72 hours. If more than 72 hours have passed since you received the notification email, click the **Continue Setting Up Access** button to request a new link.

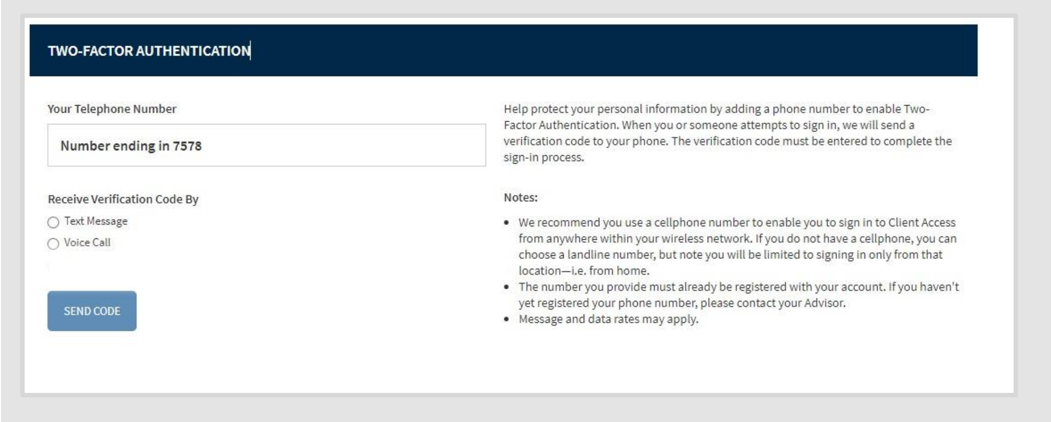


B. **Account Password:** Enter and then re-enter a Password that adheres to all rules outlined on the page. Proceed (scroll) to Challenge Questions & Answers.

C. **Challenge Questions & Answers:** Enter a minimum of 3 Questions and Answers that adhere to all rules outlined on the page. Answers to security questions must be between 3-50 characters. Proceed (scroll) to Two-Factor Authentication.



D. **Two-Factor Authentication (TFA):**



i. **Select a phone number from the Phone Number drop-down menu.** We highly recommend selecting a cell phone number for TFA.

Important: If your preferred phone number does not appear in the drop-down menu, contact your Advisor. Only Canadian or US phone numbers can be used for TFA.

ii. Choose whether you want to **receive your verification code** by Text Message or Voice Call.

iii. Click **Send Code**.

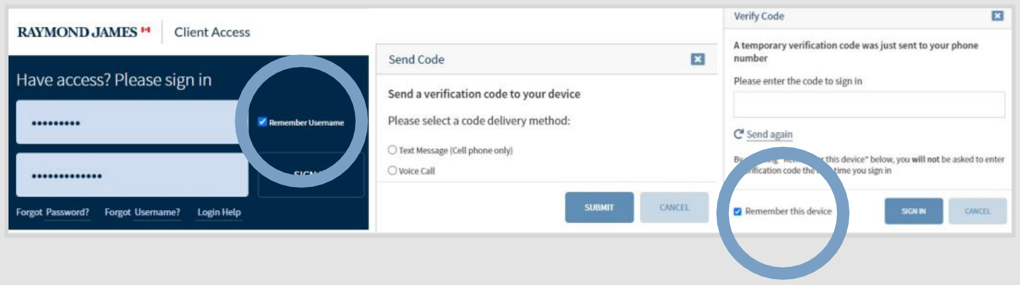
iv. **Retrieve the code** from your phone and **enter the code** in the *Verification Code Required* window.

v. Click **Verify Code**, and then click **Close**.

vi. Click **Finish** to complete your Client Site setup.

Save time when signing into Client Site!

Select the **Remember Username** and **Remember this device** options when you sign into the Client site for the first time!



RAYMOND JAMES®