

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!

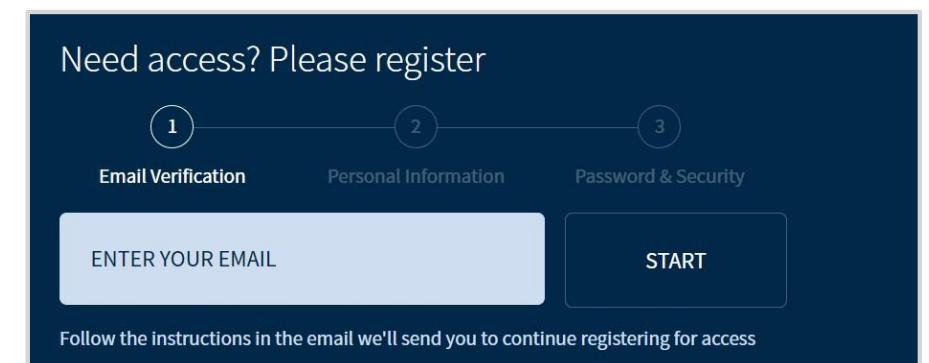
Contact your Advisor to confirm all steps and information that will be required to complete your online registration, including:

- 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

- Go to <https://client.raymondjames.ca>.
- In the **Need access? Please register** section, **Enter Your Email Address** and then click **Start**.



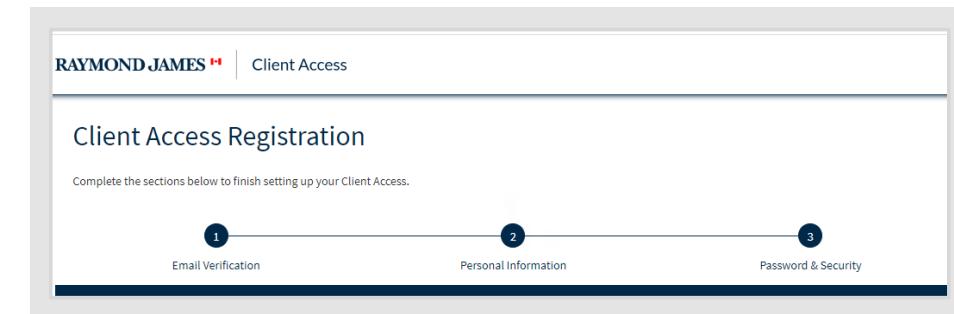
Need access? Please register

1 Email Verification 2 Personal Information 3 Password & Security

ENTER YOUR EMAIL START

Follow the instructions in the email we'll send you to continue registering for access

- A **Client Site – Email Verification Required** email notification is sent to your email address. Click the **Verify Email Address** button in the email notification.
- Complete the **Client Access Registration** page:



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Client Access Registration

Complete the sections below to finish setting up your Client Access.

1 Email Verification 2 Personal Information 3 Password & Security

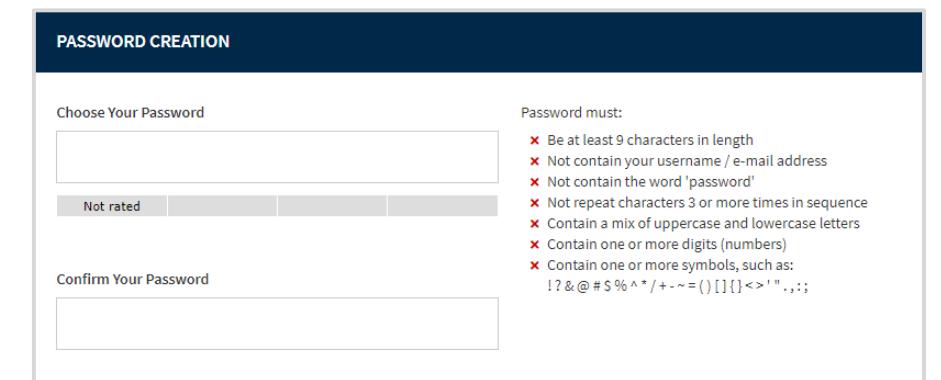
- **First and Last Name**
- **Date of Birth**
- **Branch Location**
- **Advisor's First and Last Name**
- **New Username:** Must be between 6-30 characters in length, and can contain letters, numbers and symbols.
- **Client IDs:** If you are requesting access to more than one Client ID, list any Joint 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

- 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.



PASSWORD CREATION

Choose Your Password

Not rated

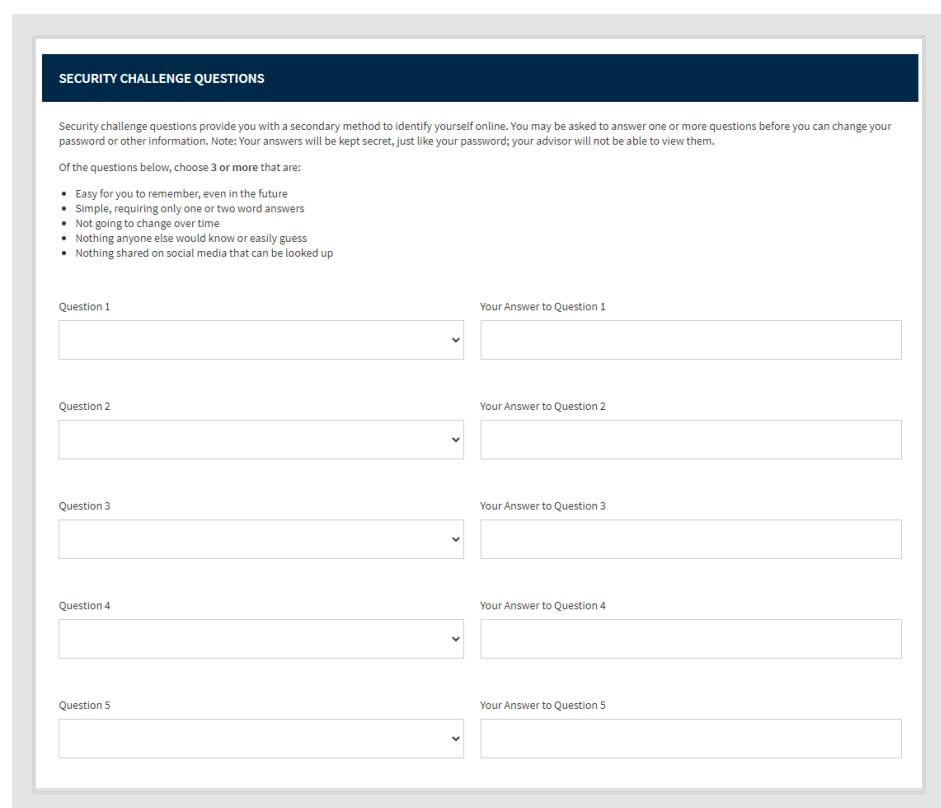
Password must:

- Be at least 9 characters in length
- Not contain your username / e-mail address
- Not contain the word 'password'
- Not repeat characters 3 or more times in sequence
- Contain a mix of uppercase and lowercase letters
- Contain one or more digits (numbers)
- Contain one or more symbols, such as: !?&@#\$%^&*+=()[]{}<>^",;:

Confirm Your Password

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

- 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.



SECURITY CHALLENGE QUESTIONS

Security challenge questions provide you with a secondary method to identify yourself online. You may be asked to answer one or more questions before you can change your password or other information. Note: Your answers will be kept secret, just like your password; your advisor will not be able to view them.

Of the questions below, choose 3 or more that are:

- Easy for you to remember, even in the future
- Simple, requiring only one or two word answers
- Not going to change over time
- Nothing anyone else would know or easily guess
- Nothing shared on social media that can be looked up

Question 1 Your Answer to Question 1

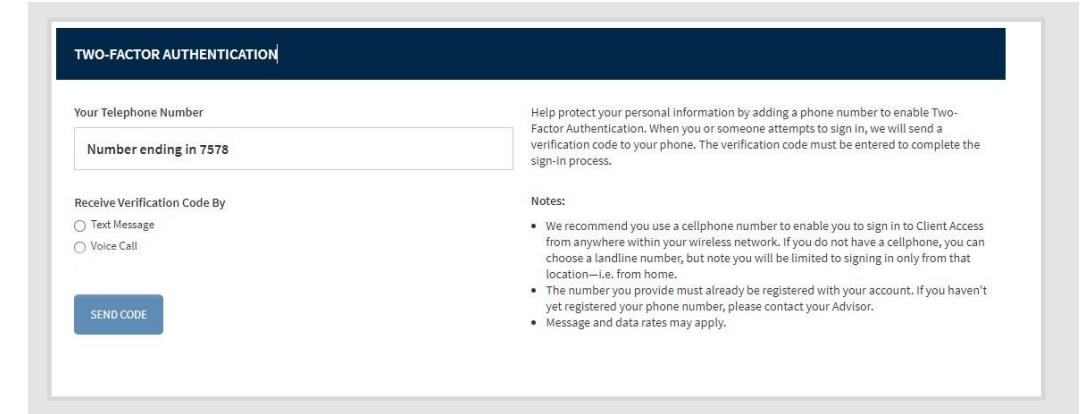
Question 2 Your Answer to Question 2

Question 3 Your Answer to Question 3

Question 4 Your Answer to Question 4

Question 5 Your Answer to Question 5

D. Two-Factor Authentication (TFA):



TWO-FACTOR AUTHENTICATION

Your Telephone Number

Number ending in 7578

Receive Verification Code By

Text Message

Voice Call

SEND CODE

Help protect your personal information by adding a phone number to enable Two-Factor Authentication. When you or someone attempts to sign in, we will send a verification code to your phone. The verification code must be entered to complete the sign-in process.

Notes:

- We recommend you use a cellphone number to enable you to sign in to Client Access from anywhere within your wireless network. If you do not have a cellphone, you can choose a landline number, but note you will be limited to signing in from that location—i.e. from home.
- The number you provide must already be registered with your account. If you haven't yet registered your phone number, please contact your Advisor.
- Message and data rates may apply.

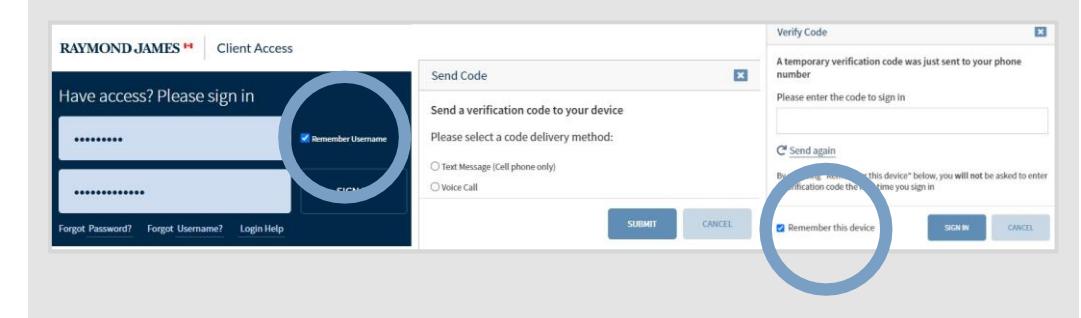
- Select a phone number from the **Phone Number** drop-down menu. We highly recommend selecting a cell phone number for TFA.

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.

- Choose whether you want to **receive your verification code** by Text Message or Voice Call.
- Click **Send Code**.
- Retrieve the code from your phone and **enter the code** in the **Verification Code Required** window.
- Click **Verify Code**, and then click **Close**.
- 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!



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Have access? Please sign in

Send Code

A temporary verification code was just sent to your phone number

Please enter the code to sign in

Send a verification code to your device

Please select a code delivery method:

Text Message (Cell phone only)

Voice Call

Forgot Password? | Forgot Username? | Login Help

Remember Username

Remember this device

SUBMIT CANCEL SIGN IN CANCEL

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