

Secure Document Exchange User Guide

Secure Document Exchange is used by Edward Jones teams with current and prospective clients to share and request documents. They also use it, with the client's direction, to share and request documents with their client's professional contacts, such as attorneys or accountants. Use this guide to learn how to:

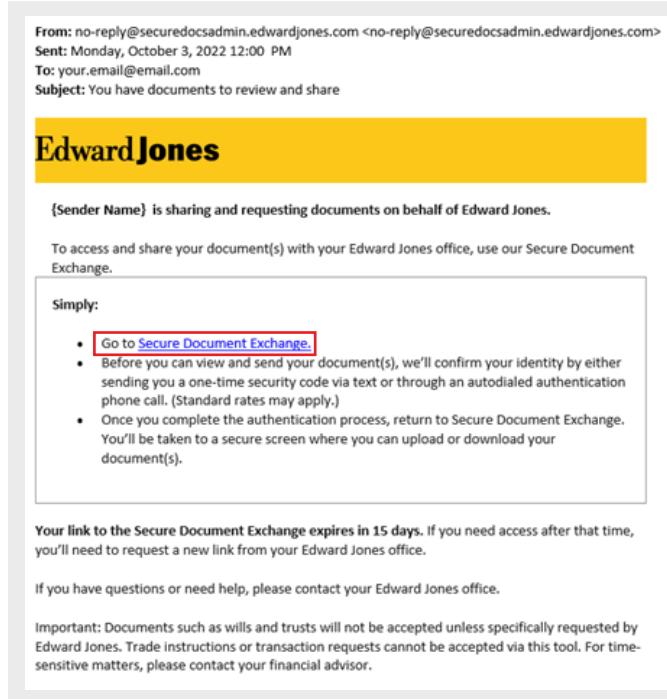
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Locate email with link to secure portal

Step 1: After an Edward Jones team has initiated an exchange of document(s), you will receive an email from no-reply@securedocsadmin.edwardjones.com with a link to a secure portal.



If you're unable to locate the email:

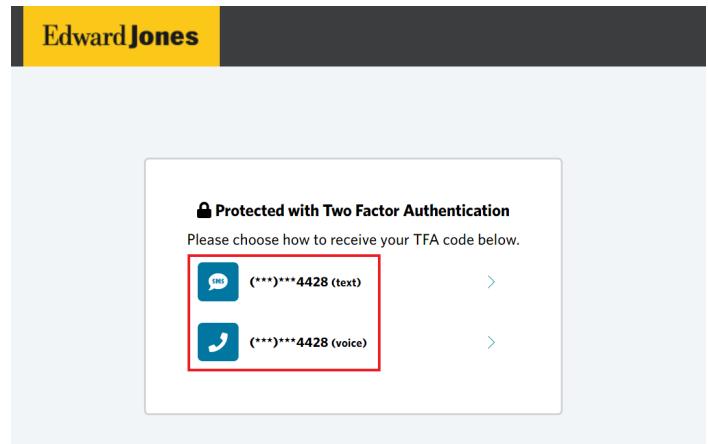
1. Search for emails from no-reply@securedocsadmin.edwardjones.com.
2. Check other folders in your inbox, such as Spam, Junk, Deleted, etc.
3. For clients or prospective clients, if you're still unable to locate the email, contact your branch team to have them reinitiate the exchange of document(s).
4. For clients' professional contacts (i.e., accountants or attorneys), if you're still unable to locate the email, contact the client to let them know you need them to work with their branch team to reinitiate the exchange of document(s).

Step 2: Select the underlined “Secure Document Exchange” link in the email.

This will take you to the entry screen to the secure portal to verify your identity. Please note that you must select the “Secure Document Exchange” link in the email to download and/or upload document(s).

Please do not respond to the email directly as the communication will not be received.

Access the secure portal using two-factor authentication



Verify your identity through either text message or a phone call.

If you verify your identity through text messaging, see below.

If you verify your identity through a phone call, see page 3.

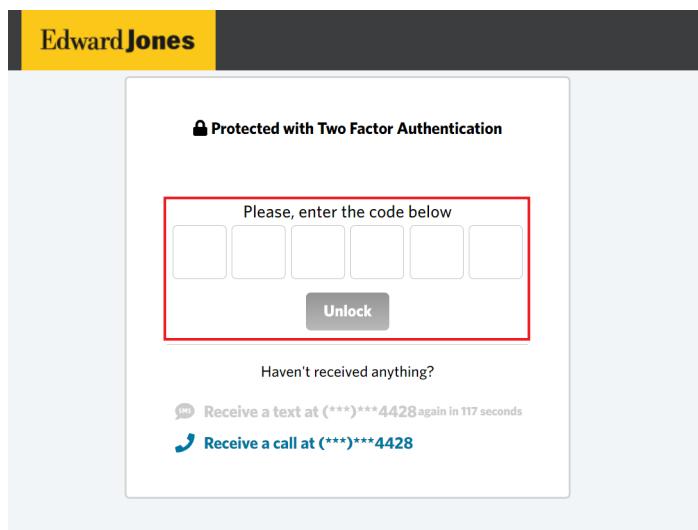
- a. Verify your identity via text message

Select the row with “(text)” next to the last four digits of your phone number. You will receive a one-time code necessary to access the secure portal.

Text Message
Today 12:11 PM

Your one-time code is 502645. Enter it in the Edward Jones Secure Document Exchange to confirm your identity.

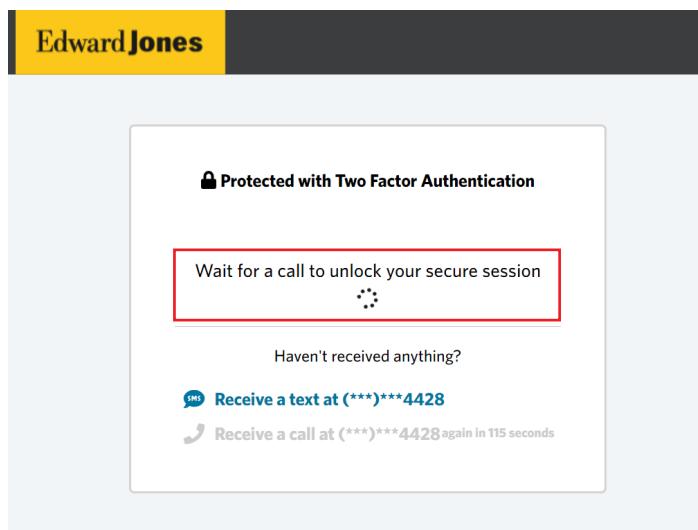
If you didn't receive a text message or your one-time code is not working, you will be able to request another one-time code in 2 minutes or change your verification method to a phone call.



Enter the code and select the “Unlock” button, which will turn blue after the code is entered. After successfully verifying your identity through entering the code, you will now be in the secure portal.

b. Verify your identity via phone call

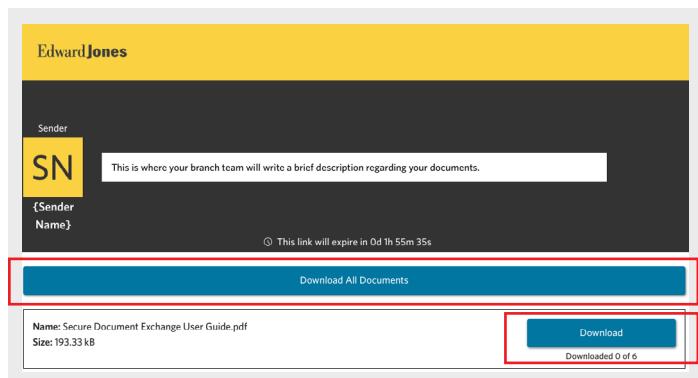
Select the row with “(voice)” next to the last four digits of your phone number. You will receive a call with instructions on how to complete the authentication process.



If you didn't receive a phone call or are not being granted access to the secure portal after following the instructions, you will be able to request another phone call in 2 minutes or change your verification method to text.

After successfully completing the authentication through the phone call, you will now be in the secure portal.

Download documents from the secure portal



To download your individual document(s), select the blue “Download” button next to each document an Edward Jones team has sent. After selecting, your document will be downloaded shortly.

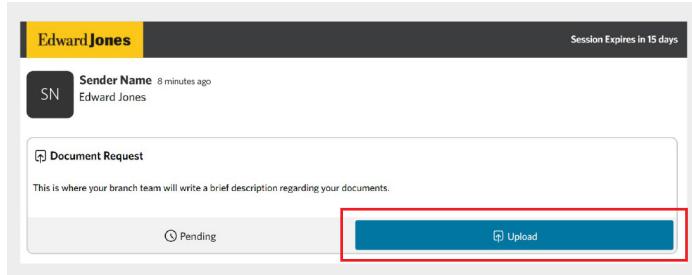
You may also download all document(s) sent to you by selecting the blue “Download All Documents” button.

You will be able to download each document six times, which is tracked under the “Download” button.

You can revisit the secure portal anytime within the **15-day expiration window** to download the document(s) an Edward Jones team has sent to you.

Upload documents to the secure portal

Please note that unless specified by your branch team, do not upload legal documents, such as wills or trusts. Trade requests are also not accepted and must be discussed verbally.



Edward Jones Session Expires in 15 days

SN Sender Name 8 minutes ago Edward Jones

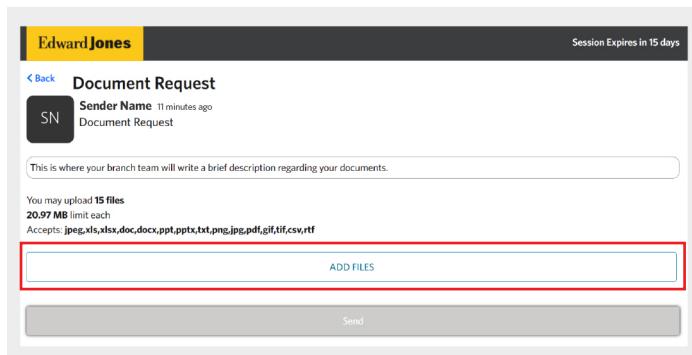
Document Request

This is where your branch team will write a brief description regarding your documents.

Pending

Upload

Step 1: Select the “Upload” button.



Edward Jones Session Expires in 15 days

Back Document Request SN Sender Name 11 minutes ago Document Request

This is where your branch team will write a brief description regarding your documents.

You may upload 15 files 20.97 MB limit each

Accepts: jpeg, xls, xlsx, doc, docx, ppt, pptx, txt, png, jpg, pdf, gif, tif, csv, rtf

ADD FILES

Send

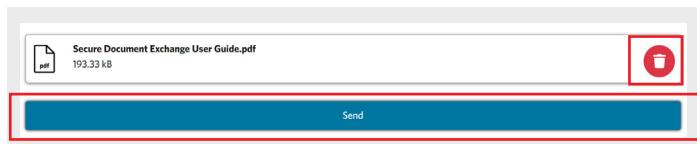
As shown in the secure portal, you may upload up to 15 documents at a time that are not greater in size than 20.97 MB each. You can upload the following file types for your branch team to view:

- jpeg, xls, xlsx, doc, docx, ppt, pptx, txt, png, jpg, pdf, gif, tif, csv and rft

Please note that we do not currently accept common file types that your phone’s camera may save a picture as, such as HEIC or HEIF. To upload a picture taken with a phone camera, consider taking a screenshot of the photo then sending that screenshot instead of the original photo.

Step 2: To upload document(s), select the “Add Files” button and locate the files you wish to upload from your device. You will be prevented from uploading a document if the file does not align to our size and file type criteria. You will also be prevented from uploading a set of documents if you upload more than 15 at once.

After uploading your files, a preview will be shown displaying the name(s) and size(s) of the document(s) you uploaded:



Secure Document Exchange User Guide.pdf 193.33 kB

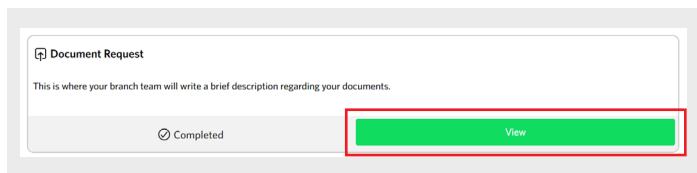
Send

Red trash can icon

If you uploaded the wrong file, select the red trash can icon to discard it.

Step 3: The “Send” button will now be blue. Be sure to select the button after uploading your document(s). **Your branch team will not receive the document(s) you uploaded unless you select the “Send” button.**

Step 4: You will then be taken to the home page of the secure portal. You can view the name of the document(s) you uploaded after sending them by selecting the green “View” button.



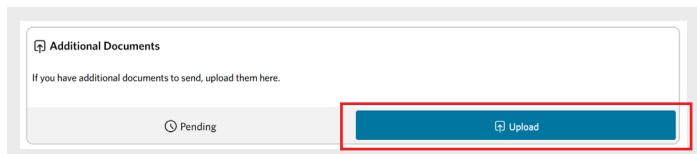
Document Request

This is where your branch team will write a brief description regarding your documents.

Completed

View

If you need to upload more than 15 documents or find that you need to upload more document(s) after previously uploading, you can upload additional document(s) by selecting the “Upload” button in the “Additional Documents” section on the home page of the secure portal. Please note that this section may take a minute to load after you uploaded your initial document(s).



Additional Documents

If you have additional documents to send, upload them here.

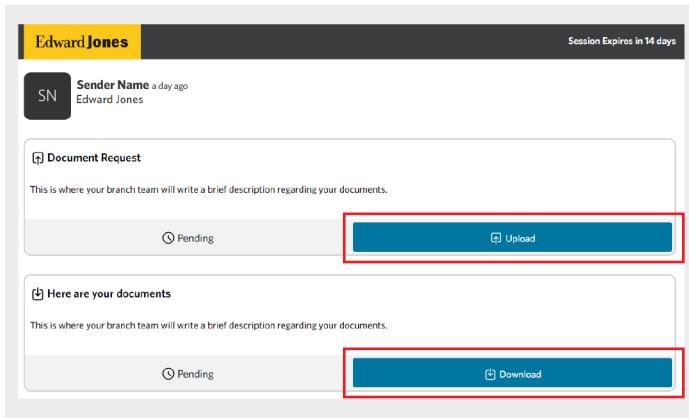
Pending

Upload

You can revisit the secure portal anytime within the **15-day expiration window** to upload document(s) to your Edward Jones team.

Download and upload documents in a single secure portal

Your Edward Jones team may want to both share document(s) with you and request you to upload document(s). This can be achieved within a single, secure portal.



The screenshot shows the Edward Jones secure portal interface. At the top, there is a yellow header bar with the 'Edward Jones' logo and a 'Session Expires in 14 days' message. Below this, the main content area is divided into sections:

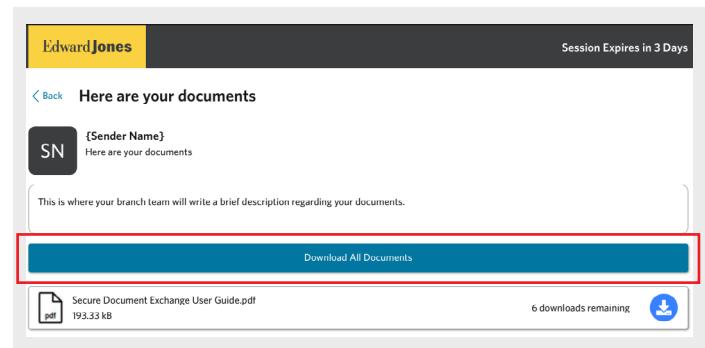
- Document Request:** Shows a 'Pending' status and a red box around the 'Upload' button.
- Here are your documents:** Shows a 'Pending' status and a red box around the 'Download' button.

Step 1: Upload document(s).

Select the “Upload” button then follow the procedures in the “Upload documents to the secure portal” section of this document.

Step 2: Download document(s).

Select the “Download” button.



The screenshot shows the 'Here are your documents' section of the portal. It includes a 'Back' button, a 'Session Expires in 3 Days' message, and a 'Download All Documents' button, which is highlighted with a red box. Below this, a specific document is listed:

 Secure Document Exchange User Guide.pdf	193.33 kB	6 downloads remaining	
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To download your individual document(s), select the blue icon with a downward facing arrow. After selecting, your document will be downloaded shortly.

You may also download all document(s) sent to you by selecting the blue “Download All Documents” button.

If you downloaded a document six times, the blue icon with a downward facing arrow will turn gray, as you have downloaded the document the maximum number of times.

You can revisit the portal anytime within the **15-day expiration window** to download the document(s) your branch team has sent to you.