

Edward Jones®

Online Access User Guide





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SIGNING UP



LOGGING IN



TEXT MESSAGING



SHARING ACCOUNTS



UPDATING YOUR USER
ID AND PASSWORD

Online Access

Online Access allows you to view, track and explore your financial accounts anytime from your desktop or mobile device.

Click a topic below for detailed step-by-step instructions.

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UPDATING YOUR USER
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If you have any questions, please contact your Edward Jones team.



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STEP 01

Sign up by invitation from your Edward Jones team or on your own

If your financial advisor emailed you an invitation to sign up for Online Access.

1. Open the email and select the “Complete sign-up” link.
2. Complete the required fields and create a user ID and password.
3. Click “Next.”
4. **Proceed to step 2.**

Edward Jones

Online Access Sign-Up

Create Your User ID & Password

Enrollment Language: English

Last 4 digits of SIN or full Driver's Licence #:

User ID:

Password: [Show Password](#)

Retype Your Password:

Next



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STEP 01

Sign up by invitation from your Edward Jones team or on your own (continued)

If you're signing up at onlineaccess.edwardjones.ca or using our mobile app:

1. Enter your account number, date of birth and last four digits of your social insurance number or full driver's license number.
2. Click "Next."

Edward Jones

Online Access Sign-Up

Verify Your Identity

Enrollment Language: English

Account Number: [Field] First 8 digits

Date of Birth: [Field] YYYY/MM/DD

Last 4 digits of SIN or full Driver's Licence #: [Field]

Next

3. Create a user ID and password.
4. Click "Next."

Edward Jones

Online Access Sign-Up

Create Your User ID & Password

User ID: [Field]

Password: [Field] Show Password

Retype Your Password: [Field]

Next

5. If you already have a verified email address on file with us, you'll be asked to confirm that it's correct.
6. If you don't, you'll need to enter your email address. We'll send you an email to confirm your address. Simply select the link in the email to verify it.
7. Click "Next."



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02

Terms and Conditions

Read the Terms and Conditions
before agreeing to them.

1. Click to accept the Terms
and Conditions.

Edward Jones

Online Access Sign-Up

Terms and Conditions

If you agree to the Online Access terms and conditions below, and consent to be enrolled in the electronic delivery of communications, click 'I have read and agree to the terms'.

Accountholders with different Tax IDs (e.g. personal, corporate, and trust accounts) must separately enroll in Online Access for each Tax ID.

A note about document delivery

If you enroll in Online Access, you consent to receive communications electronically. Once you are logged in to Online Access, you may cancel the electronic delivery of communications by selecting the 'Profile' drop-down menu at the top of the page, then 'Delivery Options'.

If you are enrolled in the electronic delivery of communications, whenever there are new communications for you to review in Online Access, we will notify you by email to michael.home@edwardjones.com. More information about electronic communication through Online Access can be found in the Online Access terms and conditions, by visiting [E-delivery of documents | Edward Jones](#), or by speaking with your financial advisor.

Edward Jones Online Access Terms and Conditions

By using Online Access, you agree to the terms and conditions of the Online Access Agreement, which govern your access to and use of Edward Jones Online Access. The Online Access Agreement shall take precedence.

(d) Online Access may contain links to third-party sites or materials. These third-party sites and materials may be subject to different privacy and security policies and settings than Online Access and, by accessing or using these third-party sites and materials, you consent to each third party's terms of access and use.

(e) If you are using Online Access as an authorized party of an Edward Jones account owner, you acknowledge that you must obtain your own unique Login, and you represent that you are authorized by the account owner to access information related to them and their account.

(f) Online Access may not always be available due to maintenance, system outages, or other events beyond our control.

12. Indemnification

You agree to indemnify and hold Edward Jones harmless from any cause of action, claims, expenses, or liabilities that might be asserted by you or any third party against Edward Jones to the extent they directly arise from your breach of these Terms, your misuse of Online Access, or your violation of applicable law or the rights of any person.

[Download & Print \(PDF\)](#)

1

I have read and agree to the terms

[I decline. Return to login](#)

For assistance call [1-866-788-4880](tel:1-866-788-4880)
Monday - Friday 8 a.m. - 8 p.m. ET



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03

Select your security preference

Sign up for text messaging.

Edward Jones

Online Access Setup

Select Your Security Preference

Enrol in Texting

Enrolling in texting lets you:

- Text with your Edward Jones office
- Sign in to Online Access with additional security choices
- Sign up for text alerts

Setup Security Questions

Continue

1. Verify your mobile phone number.

Edward Jones

Online Access Sign-Up

Verify Your Mobile Phone

Enter a 10-digit phone number that can receive text messages.
Please omit dashes. (Example: 1234567890)

Please note: some branch texts could be considered or may include marketing messages.

Only two-factor authentication messaging will be received via short code 81284; Edward Jones may send marketing messages via other short codes. Standard message and data rates may apply.

Mobile Phone Number: []

Set up challenge questions instead.

I have read and agree to the terms
Send Verification Text

I decline

2. Click “Send Verification Text” to consent to the terms.
3. Enter the verification code you received by text.
4. Click “Log In.”

Edward Jones

Enter Your Code

A six-digit code was sent to mobile phone XXX-XXX-2142.

Six-digit Code

Remember this device

Log In

Did you not receive a code? You can request a new code, select a new delivery option or call 866-788-4880 for assistance.

Resend Code

Select New Delivery Option

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You can choose from two security options:

1. Sign up for text messaging
2. Answer security questions



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STEP 03

Select your security preference (continued)

Set up security questions.

1. Choose your security questions and answers.
2. Select “Complete enrolment.”
3. Once you’ve completed these steps, you should see a welcome screen that features a snapshot of your accounts.

Edward Jones

Online Access Setup

Security Questions

1 2 3 4 5 6

Question 1

Select One

Enter your answer

Question 2

Select One

Enter your answer

Question 3

Select One

Enter your answer

1

2

Complete enrolment

[Back](#)



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STEP 01

Log in to Online Access at onlineaccess.edwardjones.ca

With two-step authentication, we'll send you a code to confirm your identity when you log in to Online Access.

Edward Jones

Country: Canada | English ▾

Welcome to Online Access

☐ Save user ID on this device

Log In

[Find Your User ID](#) | [Reset your password](#)

[Support](#) | [Disclosures](#) | [Privacy & Security Center](#)

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If you're already an Edward Jones client:

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[Explore what you can see and do](#) >

[Learn more](#) >

Need help logging in?

[View our help guides](#) >

New to Edward Jones?

[Contact a financial advisor](#) >



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STEP 02

Select one of three options to receive your security code

We offer three ways you can receive a security code: by text, a phone call or an email.

1. Text me a code (go to Page 10).
 - i. Already signed up for text messaging with Edward Jones
 - ii. Not signed up for text messaging with Edward Jones
2. Call me with a code (go to Page 13).
3. Email me a code (go to Page 14).

Edward Jones

Select Your Delivery Method

We'll need to confirm your identity before you can log in.

Text me a code >
XXX-XXX-4866

Call me with a code >

[Confirm my identity another way](#)

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STEP 02

Select one of three options to receive your security code (continued)

Option 1: Text me a code: already signed up for text messaging with Edward Jones.

1. Select “Text me a code.”
2. We’ll text a code to the verified mobile number we have on file. Simply enter it to continue.
3. Click “Log In” to complete your login.

Select Your Delivery Method

We'll need to confirm your identity before you can log in.

1

Text me a code

XXX-XXX-4720



Call me with a code



[Confirm my identity another way](#)

Enter Your Code

A six-digit code was sent to mobile phone XXX-XXX-6416.

Six-digit Code

☐ Remember this device [?](#)

3

Log In

Did you not receive a code? You can request a new code, select a new delivery option or call [866-788-4880](tel:866-788-4880) for assistance.

[Resend Code](#)

[Select New Delivery Option](#)



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STEP 02

Select one of three options to receive your security code (continued)

Text me a code: Not signed up for text messaging with Edward Jones.

1. Select “Text me a code.”
2. Then select the phone number you’d like to use to receive texts.
3. If you’ve chosen a number that isn’t listed as “mobile” on your account, you’ll see this pop-up. Click “OK.”

Edward Jones

Select Your Delivery Method

We'll need to confirm your identity before you can log in.

1 Text me a code
XXX-XXX-2142

Call me with a code

[Confirm my identity another way](#)

[Support](#) [Disclosures](#) [Privacy & Security Center](#)

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Select Your Delivery Method

We'll need to confirm your identity before you can log in.

Text me a code
XXX-XXX-2142

Call me with a code

[Confirm my identity another way](#)

Are you sure you would like to receive a text at this number? ×

XXX-XXX-2142

3 OK



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STEP 02

Select one of three options to receive your security code (continued)

4. Read and accept the Terms and Conditions.

Terms & Conditions [X]

Review Terms and Conditions Since this is your first time texting with us, please review our Texting Terms and Conditions. With texting, you'll be signed up to text with your Edward Jones office, receive appointment reminders and access account security features.

[Download & Print \(PDF\)](#)

Edward Jones Texting and Two-Step Authentication Terms and Conditions

These terms and conditions ("Terms") are between you and Edward Jones, an Ontario limited partnership ("Edward Jones") and govern your sending of texts to and receipt of texts from Edward Jones ("Texting") which may include marketing communications and/or authentication to log into Edward Jones Online Access

4 I have read and agree to the terms

I decline

5. We'll text a code to the mobile number you provided.

Simply enter the code to continue.

6. Click "Log In" to complete your login.

Edward Jones

Enter Your Code

A six-digit code was sent to mobile phone XXX-XXX-3221.

Six-digit Code **5**

☐ Remember this device ?

Log In **6**

Did you not receive a code? You can request a new code, select a new delivery option or call [800-441-5203](tel:800-441-5203) for assistance.

[Resend Code](#)

[Select New Delivery Option](#)



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STEP 02

Select one of three options to receive your security code (continued)

Option 2: Call me with a code.

1. You'll receive an auto-dialed call containing your security code.
2. Select "Call me with a code."
3. Select your preferred number.
4. Enter the code.
5. Choose if you'd like the platform to remember your device.
6. Click "Log In" to complete your login.

Edward Jones

Select Your Delivery Method

We'll need to confirm your identity before you can log in.

Text me a code
XXX-XXX-4866

Call me with a code

Confirm my identity another way

By selecting the number at which you would like to be called, you consent to an auto-dialed phone call.

XXX-XXX-4866
XXX-XXX-6160
XXX-XXX-8796
XXX-XXX-9845

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Edward Jones

Enter Your Code

A six-digit code was sent to mobile phone XXX-XXX-8988.

4 Six-digit Code

5 ☐ Remember this device ?

6 Log In

Did you not receive a code? You can request a new code, select a new delivery option or call 800-441-5203 for assistance.

[Resend Code](#)

[Select New Delivery Option](#)

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Select one of three options to receive your security code (continued)

Option 3: Email me a code

1. Select “Confirm my identity another way”
2. We’ll email a code to the verified email address we have on file. Enter it to continue.
3. Answer the security question and click “Log In” to complete your log in.

Edward Jones

Select Your Delivery Method

We'll need to confirm your identity before you can log in.

Text me a code >
XXX-XXX-2142

Call me with a code >

1 Confirm my identity another way

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Edward Jones

Enter Your Code

A six-digit code was sent to ****st6@edwardjones.com. Check your email and keep this window open to enter the code you receive.

2 Six-digit Code

Continue

Did you not receive a code? You can request a new code, select a new delivery option or call [800-441-5203](tel:800-441-5203) for assistance.

[Resend Code](#)

[Select New Delivery Option](#)

Edward Jones

Answering this security question helps us verify your identity.

User ID: *****TEST

What was your favorite sport in high school?

3 Answer

[Answer a different question](#)

☐ Remember this device ⓘ



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STEP 01

How to enrol in texting

This guide will walk you through how to enrol for text messaging through your Edward Jones Online Access account. Once enrolled, you will be able to communicate with your branch team by text message. The process only takes a few minutes.

Before you begin:

Please make sure you have the following ready before you start:

- Your Online Access user ID and password
- Your mobile phone nearby — you will receive a text message during this process

Edward Jones  English ▾

Welcome to Online Access



☐ Save user ID on this device

[Log In](#)

[Find Your User ID](#) | [Reset your password](#)

Not enrolled in Online Access? [Get Started](#) 

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STEP 01

Enrolment steps: Follow these steps to enrol in Edward Jones texting

Log in to your Online Access account

Visit onlineaccess.edwardjones.ca and sign in using your existing user ID and password.

Edward Jones

Country: Canada | English ▾

Welcome to Online Access

User ID

Password

☐ Save user ID on this device

Log In

[Find Your User ID](#) | [Reset your password](#)

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New to Online Access?

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STEP 02

Open your profile

Once you are logged in, look for your initials in a circle near the top right corner of the screen. Click the arrow beside your initials, then select “Profile” from the menu that appears.

Edward Jones Home Accounts Messages Documents Market Research **GV** ^ Log Out

Accounts

Total Current Value \$449,553.09 CAD \$118,610.73 USD
Exchange Rate (USD/CAD) as of 2026/06/30 = 1.4025
[As of previous market close](#)

Edward Jones Investment Accounts [Go to Accounts](#)

Corporation-1 \$449,553.09 CAD \$118,610.73 USD
****6749

View Documents >
Edit Closed Accounts >
Watch List >
Document Delivery Settings >

My Advisor
RA Rodney Adams
[Go to My Team](#)

Message **Request Appointment**

PHONE
[\(780\) 454-9626](#)

Performance Over Time

Return in \$/Percent: \$2,073.70/9.42% [Expand](#)

Time Frame: 1 Year Start Date*: 2025/7/03 End Date*: 2026/7/02
Format as yyyy/mm/dd



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STEP 03

Go to Communication Preferences

Near the top of your profile page, you will see a section labelled “Personal.” Under that heading, click on “Communication Preferences.”

Edward Jones Home Accounts Messages Documents Market Research GV Log Out

Profile

Personal

Personal Information
View your name and primary address. >

Communication Preferences
Edit your phone numbers, email address or text message enrolment status. >

Security

Online Access Login
Edit your Online Access user ID, password or remember device preference. >

Security Alerts
Edit your profile security alerts. >

Security Questions
Edit your login security questions. >



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STEP 04

Find the “Your Phone Numbers” section

On the Communication Preferences page, you’ll see the heading “Your Phone Numbers.” Within this section, click the button that says “Enrol now.”

The screenshot shows the Edward Jones website's Communication Preferences page. The top navigation bar includes the Edward Jones logo, a home icon, and links for Accounts, Messages, Documents, and Market Research. A user profile icon (GV) and a Log Out button are also present. The main heading is 'Communication Preferences'. Below this, there's a breadcrumb trail: 'Profile Home > Communication Preferences'. The 'Your Email Address' section shows 'cde@fgh.com' with a note that Edward Jones sends communications to the primary email and an 'Edit' link. The 'Your Phone Numbers' section lists two numbers: a Mobile number '780-940-4866' and a Vacation number '780-465-6160'. The Mobile number is marked as the primary number. A red box highlights the 'Enrol now' link next to the Mobile number. An 'Add Phone Number +' link is at the bottom of the section.

Your Phone Numbers		
Mobile	780-940-4866	This is your primary number. This number is not currently enrolled in text messaging. Enrol now.
Vacation	780-465-6160	



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STEP 05

A. Confirm or add your mobile phone number

1. A list of phone numbers associated with your account will appear. Check that your correct mobile phone number is shown and select it.

Do not see your mobile number?

If your mobile number is not listed, click “Add a Phone Number” and enter your mobile number in the field provided. Make sure you enter the number where you would like to receive text messages.

B. Read and agree to the Terms and Conditions

2. Take a moment to review the texting Terms and Conditions that are displayed on the screen.
3. When you are ready, check the box beside “I have read and agree to the terms and conditions.”

C. Click “Send Verification Code”

4. Click the “Send Verification Code” button.
Edward Jones will send a six-digit verification code to the mobile phone number you selected.

The screenshot shows the 'Enrol Number in Texting' page. At the top, there's a navigation bar with 'Edward Jones' and links for Accounts, Messages, Documents, Market Research, and a Log Out button. The main heading is 'Enrol Number in Texting'. Below it, a breadcrumb trail reads 'Profile Home > Communication Preferences > Enrol in Texting'. The section 'Choose a Phone Number' asks the user to select a mobile number for texting. Two options are listed: 'Mobile - 780-940-4866' (selected with a radio button) and 'Vacation - 780-465-6160'. A red box labeled '1' highlights these options. Below them is a button 'Add a Phone Number'. The next section is 'Review the Terms and Conditions', which includes a checkbox for accepting terms. A red box labeled '2' highlights the terms text, which includes a 'Download Agreement PDF' link and a detailed disclaimer. A red box labeled '3' highlights the checkbox 'I have read and agree to the terms and conditions.' at the bottom. At the very bottom, there are two buttons: 'Cancel' and 'Send Verification Code'. A red box labeled '4' highlights the 'Send Verification Code' button.



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STEP 06

Check your text messages for the verification code

1. Pick up your mobile phone and open your text messages. You should receive a text from Edward Jones shortly containing a six-digit verification code.

Tip: If you do not receive the text within a few minutes, please check that the correct mobile number was selected in Step 6, and try again.

Enter the code and click “Verify Phone Number”

2. Type the six-digit code from your text message into the field on the screen, then click “Verify Phone Number.”

Verify Texting Phone Number

We sent your verification code to **780-940-4866**. Enter the code to verify your phone number and enrol in Edward Jones texting. All Edward Jones text messages, text-alerts, and multifactor authentication messages will be sent here instead of any previously enrolled number.

*Six-Digit Verification Code

Resend Code

Cancel & Don't Enrol Verify Phone Number

You are now enrolled in Edward Jones Texting!

You will now be able to send and receive text messages, including messages to your branch team and verification codes when signing in or making changes to your account.

Need more help? If you have followed the steps in this guide and are still experiencing difficulties, please do not hesitate to reach out to us. Our Online Client Support team is available to assist you:

Online Client Support: 1-866-788-4880

We appreciate your patience, and we thank you for your continued trust in Edward Jones.



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STEP 01

How to share and unshare accounts

Edward Jones Online Access — Step-by-Step Guide

This guide will walk you through how to share your Edward Jones account information with another Online Access user, and how to stop sharing at any time.

Please note that account sharing is view-only.

Account sharing through Online Access allows another person to view your account information only. It does not create a joint account, nor does it give the other person the ability to complete transactions or trades on your behalf.

Edward Jones

English

Welcome to Online Access

User ID

Password

☐ Save user ID on this device

Log In

[Find Your User ID](#) | [Reset your password](#)

Not enrolled in Online Access? [Get Started](#)

[Support](#) [Disclosures](#) [Privacy & Security Center](#)

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STEP 01

Part 1 – Sharing your account

Log in to your Online Access account

Visit onlineaccess.edwardjones.ca and sign in using your existing user ID and password.

Edward Jones

Country: Canada | English ▾

Welcome to Online Access

☐ Save user ID on this device

Log In

[Find Your User ID](#) | [Reset your password](#)

New to Online Access?
If you're already an Edward Jones client:

Sign up

Explore what you can see and do

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STEP 02

Open your profile

Once you are logged in, look for your initials in a circle near the top right corner of the screen. Click the arrow beside your initials, then select “Profile” from the menu that appears.

The screenshot displays the Edward Jones online access interface. At the top, a dark navigation bar contains the Edward Jones logo, a home icon, and links for Accounts, Messages, Documents, Market Research, and a user profile icon (a yellow circle with 'GV') next to a 'Log Out' button. A red box highlights the profile icon and the dropdown menu that appears, which contains 'Profile' and 'Support' options. Below the navigation bar, the 'Accounts' section shows the 'Total Current Value' as \$449,553.09 CAD and \$118,610.73 USD, with an exchange rate of 1.4025. It also lists 'Edward Jones Investment Accounts' with a link to 'Go to Accounts'. The 'Performance Over Time' section shows a return of \$2,073.70/9.42% for a 1-year period from 2025/7/03 to 2026/7/02. On the right, a 'My Advisor' section for Rodney Adams (initials RA) includes a 'Go to My Team' link, 'Message' and 'Request Appointment' buttons, and a phone number (780) 454-9626.



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STEP 03

Go to Account Sharing

Scroll down the Profile page until you see a section labelled “Account Settings.” Under that heading, click on “Account Sharing.”

Edward Jones Accounts Messages Documents Market Research MB Log Out

Profile

Personal

- Personal Information**
View your name and primary address. >
- Communication Preferences**
Edit your phone numbers, email address or text message enrolment status. >

Security

- Online Access Login**
Edit your Online Access user ID, password or remember device preference. >
- Manage Remembered Devices**
Edit the devices you've remembered for a faster login experience. >
- Security Alerts**
Edit your profile security alerts. >
- Security Questions**
Edit your login security questions. >

Account Settings

- Closed Accounts**
View the closed accounts associated with this user ID. >
- Account Sharing**
Allow other Edward Jones clients that you specify to view your account details. >



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STEP 04

Click “Share My Account”

On the Account Sharing page, click the “Share My Account” button to begin the sharing process.

Edward Jones

[Accounts](#)
[Messages](#)
[Documents](#)
[Market Research](#)

MB

Log Out

Account Sharing

[Profile Home](#) > [Account Sharing](#)

Send an invitation to get started sharing your account with another person.

By clicking 'Share My Account' you consent to sharing your account and personal information through Online Access, with the person/people you invite. Tax documents are excluded from shared accounts as they contain Social Insurance Numbers.

Share My Account

My Accounts Others Are Viewing

Olive Rodgers	Other-1	Cancel Sharing
Chen-Hsing Lee	Individual-1	Cancel Sharing
Janice Ball	Individual-1	Cancel Sharing

Other Accounts I Am Viewing

You are not viewing any other accounts.

Pending Sent Requests

smozyp@nvpenuaturpcnmmv.com	Individual-1	Sent: July 22, 2026	Cancel Request
rrp@rrp.com	AutoTest2026-05-16	Sent: July 21, 2026	Cancel Request



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TEXT MESSAGING



SHARING ACCOUNTS

UPDATING YOUR USER
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05

Enter the recipient's email address

1. Type in the email address of the person you would like to share your accounts with, then enter it a second time to confirm it is correct.

Please note: The person you are sharing with must already be a registered Edward Jones Online Access user. If they do not yet have an Online Access account, they will need to create one before you can share your accounts with them.

Create a 6-digit PIN

2. You will be asked to create a 6-digit PIN. This PIN is private and should be shared only with the person you are granting access to. They will need this PIN to accept the account sharing invitation.

Keep your PIN safe:

Please share this PIN with the recipient privately—for example, by phone or in person. Do not include it in an email.

Select the accounts you wish to share and click “Share Account”

3. A list of your accounts will be displayed. Select the accounts you would like to share, then click the “Share Account” button to send the invitation.

Edward Jones Accounts Messages Documents Market Research MB Log Out

Account Sharing

Profile Home > Account Sharing

Invite another person to view your account(s)

What is their email?*

Email must belong to an existing Online Access user

Confirm Email*

For your security, create and pass along a 1 time use 6-digit PIN

6-digit PIN*

This PIN should only be shared with the person you intend to view your account information. In the event your recipient shares an email with another person, come back to the management screen to ensure your accounts sensitivity is preserved.

Important: Anyone who has access to the email address and PIN that you've provided will be able to view your accounts. The PIN is only active for 7 days.

Account(s) to share:

☐ Joint-1

☐ Individual-1

☐ Other-1

☐ RDSP-1

Cancel Share Account



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SHARING ACCOUNTS



UPDATING YOUR USER
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STEP 05



What happens next?

The recipient will receive an email notification letting them know you would like to share your accounts with them. When they log in to their Online Access account, they will also see a pop-up message asking them to enter the PIN you created and to accept the account sharing invitation.

Once they have entered the correct PIN and accepted, they will be able to view your shared accounts.



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SHARING ACCOUNTS



UPDATING YOUR USER
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STEP 01

Part 2 – Unsharing your account

If you would like to stop sharing your account with someone, follow these steps.

Log in to your Online Access account

Visit onlineaccess.edwardjones.ca and sign in using your existing user ID and password.

Edward Jones

Country: Canada | English ▾

Welcome to Online Access

☐ Save user ID on this device

[Log In](#)

[Find your user ID](#) | [Reset your password](#)

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New to Online Access?

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[Watch our sign-up and login help videos](#) >

New to Edward Jones?

[Contact a financial advisor](#) >



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STEP 02

Open your profile

Once you are logged in, look for your initials in a circle near the top right corner of the screen. Click the arrow beside your initials, then select “Profile” from the menu that appears.

The screenshot displays the Edward Jones online access interface. At the top, a dark navigation bar contains the Edward Jones logo, a home icon, and links for Accounts, Messages, Documents, Market Research, and a user profile icon (GV) with a dropdown arrow. A red box highlights the dropdown menu that appears when the profile icon is clicked, showing options for Profile and Support. Below the navigation bar, the main content area is divided into several sections. On the left, the 'Accounts' section shows the 'Total Current Value' as \$449,553.09 CAD and \$118,610.73 USD, with an exchange rate of 1.4025. Below this, it lists 'Edward Jones Investment Accounts' with a link to 'Go to Accounts'. A specific account, 'Corporation-1', is also listed with the same values. On the right, a sidebar contains links for 'View Documents', 'Edit Closed Accounts', 'Watch List', and 'Document Delivery Settings'. At the bottom right, a 'My Advisor' section for Rodney Adams (RA) includes buttons for 'Message' and 'Request Appointment', and a phone number: (780) 454-9626. The bottom left section, 'Performance Over Time', shows a return of \$2,073.70/9.42% for a 1-year period from 2025/7/03 to 2026/7/02, with an 'Expand' button.



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STEP 03

Find “My Accounts Others Are Viewing”

1. Scroll down the Profile page until you see the section labelled “My Accounts Others Are Viewing.” This section lists all accounts you are currently sharing with other users.

Click “Cancel Sharing” next to the account you wish to unshare

2. Find the account you would like to stop sharing and click “Cancel Sharing” beside it.

Edward Jones

[Accounts](#)
[Messages](#)
[Documents](#)
[Market Research](#)

MB

[Log Out](#)

Account Sharing

Profile Home > [Account Sharing](#)

Send an invitation to get started sharing your account with another person.

By clicking 'Share My Account' you consent to sharing your account and personal information through Online Access, with the person/people you invite. Tax documents are excluded from shared accounts as they contain Social Insurance Numbers.

[Share My Account](#)

My Accounts Others Are Viewing

Olive Rodgers	Other-1	Cancel Sharing
Chen-Hsing Lee	Individual-1	Cancel Sharing
Janice Ball	Individual-1	Cancel Sharing

Other Accounts I Am Viewing

You are not viewing any other accounts.

Pending Sent Requests

smozyp@nvpenuaturpcnmmv.com	Individual-1	Sent: July 22, 2026	Cancel Request
rrp@rrp.com	AutoTest2026-05-16	Sent: July 21, 2026	Cancel Request

Pending Received Requests

You have no received requests that are pending.



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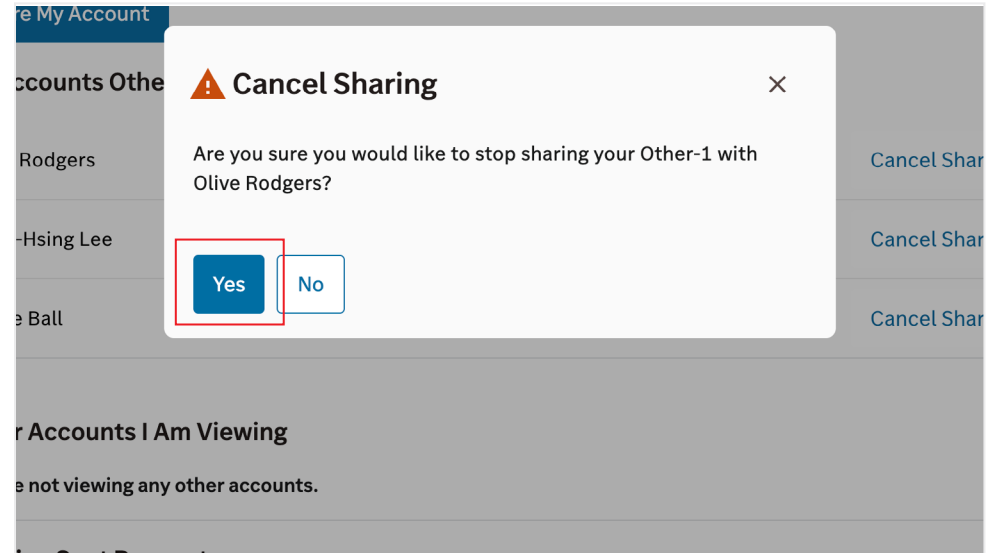
STEP 04

Confirm the change

A pop-up window will appear asking you to confirm that you would like to stop sharing that account. Click “Yes” to confirm.

Account unshared successfully

Your account will immediately no longer be visible to the other user. They will lose access to the shared account information right away.



Need more help? If you have followed the steps in this guide and are still experiencing difficulties, please do not hesitate to reach out to us. Our Online Client Support team is available to assist you:

Online Client Support: 1-866-788-4880

We appreciate your patience, and we thank you for your continued trust in Edward Jones.



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UPDATING YOUR USER
ID AND PASSWORD

STEP 01

How to change your user ID or password

This guide will walk you through how to update your user ID or your password while you are logged in to your Edward Jones Online Access account.

Getting started – log in and navigate to your profile

Before you can make any changes, you will need to sign in to your account. Please complete the following steps first.

Edward Jones

 English ▾

Welcome to Online Access



☐ Save user ID on this device

Log In

[Find Your User ID](#) | [Reset your password](#)

Not enrolled in Online Access? [Get Started](#) 

[Support](#) [Disclosures](#) [Privacy & Security Center](#)

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UPDATING YOUR USER
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STEP 01

Log in to your Online Access account

Visit onlineaccess.edwardjones.ca and sign in using your existing user ID and password.

Edward Jones

Country: Canada | English ▾

Welcome to Online Access

☐ Save user ID on this device

Log In

[Find your user ID](#) | [Reset your password](#)

[Support](#) [Disclosures](#) [Privacy & Security Center](#)

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STEP 02

Open your profile

Once you are logged in, look for your initials in a circle near the top right corner of the screen. Click the arrow beside your initials, then select “Profile” from the menu that appears.

The screenshot displays the Edward Jones online access interface. At the top, a dark navigation bar contains the Edward Jones logo, a home icon, and links for Accounts, Messages, Documents, Market Research, and a user profile icon (a yellow circle with 'GV' and an upward arrow). A 'Log Out' button is on the far right. A red box highlights the profile dropdown menu that appears when the user icon is clicked, showing 'Profile' and 'Support' options. Below the navigation bar, the 'Accounts' section shows the 'Total Current Value' as \$449,553.09 CAD and \$118,610.73 USD, with an exchange rate of 1.4025. It also lists 'Edward Jones Investment Accounts' with a 'Go to Accounts' link. The 'Performance Over Time' section shows a return of \$2,073.70/9.42% for a 1-year period from 2025/7/03 to 2026/7/02. On the right, a 'My Advisor' section for Rodney Adams (initials RA) includes links for 'View Documents', 'Edit Closed Accounts', 'Watch List', 'Document Delivery Settings', 'Message', and 'Request Appointment', along with a phone number: (780) 454-9626.



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UPDATING YOUR USER
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STEP 03

Find the Security section

Scroll down the Profile page until you see a section labelled “Security.” Under that heading, click on “Online Access Login.”

Edward Jones Accounts Messages Documents Market Research GV Log Out

Profile

Personal

Personal Information
View your name and primary address. >

Communication Preferences
Edit your phone numbers, email address or text message enrolment status. >

Security

Online Access Login
Edit your Online Access user ID, password or remember device preference. >

Security Alerts
Edit your profile security alerts. >

Security Questions
Edit your login security questions. >



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STEP 04

Click “Edit” next to the item you want to change

On the right-hand side of the screen, you will see an “Edit” button beside both your user ID and your password. Click “Edit” next to whichever one you would like to update, then follow the instructions in the relevant section below.

The screenshot shows the Edward Jones Online Access Login page. The top navigation bar includes the Edward Jones logo, a home icon, and links to Accounts, Messages, Documents, and Market Research. A user profile icon with 'GV' and a 'Log Out' button are also present. The main content area is titled 'Online Access Login' and contains a section for 'Update Your Login Information'. This section has three rows: 'User ID' with the value 'alphatestgroup4', 'Password' with masked characters '*****', and a 'Remember This Device' toggle switch. To the right of the 'User ID' and 'Password' fields are 'Edit' buttons, which are highlighted with a red box in the image.

Update Your Login Information	
User ID	alphatestgroup4
Password	*****
Remember This Device	☐ Toggle on to skip security code validation next time you log in from this device.



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UPDATING YOUR USER
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05

Part 1 – Changing your user ID

After clicking “Edit” next to your user ID, follow these steps to choose your new user ID.

1. Type in your desired new user ID

Enter the user ID you would like to use going forward. The system will let you know right away if that user ID is already taken by someone else, so you may need to try a few variations.

2. Click “Update User ID”

Once you are happy with your new user ID and it has been accepted, click the “Update User ID” button to save your change.

Edward Jones Accounts Messages Documents Market Research GV Log Out

Edit User ID

Profile Home > Online Access Login > Edit User ID

Current user ID: alphatestgroup4

Your new user ID must:

- Be 6-20 characters
- Be different from your password
- Not contain spaces or special characters
- Not contain your account number or your Social Insurance Number/Driver's Licence Number

*New User ID

Cancel Update User ID

Your new user ID must follow these guidelines:



Your new user ID MUST...

- Be between 6 and 20 characters long
- Be different from your password



Your new user ID CANNOT...

- Contain spaces or special characters
- Contain your account number
- Contain your social insurance number



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Part 2 – Changing your password

After clicking “Edit” next to your password, follow these steps to set a new password.

1. Confirm your current password

You will first be asked to enter your current password to confirm your identity. Type it into the field provided.

2. Enter and confirm your new password

Type your new password into the “New Password” field, then type it again in the “Confirm New Password” field to make sure they match.

3. Click “Update Password”

When you are finished entering and confirming your new password, click the “Update Password” button.

Edward Jones

Accounts Messages Documents Market Research 6V Log Out

Edit Password

Profile Home > Online Access Login > Edit Password

Password Criteria

Strong passwords are longer and combine upper- and lowercase letters, numbers and special characters.

Your new case-sensitive password must:

- Be 8-60 characters
- Contain at least 2 letters
- Contain 1 number or 1 special character
- Not contain spaces or & ` ' 0 = [] ; " ' < >
- Not be the same as your user ID
- Not be the same as your current password

*Current Password [Show Password](#) 1

*New Password [Show Password](#) 2

*Confirm Password [Show Password](#) 2

Cancel [Update Password](#) 3



Your new password MUST...

- Be between 8 and 60 characters long
- Contain at least 2 letters
- Contain at least 1 number or 1 special character



Your new password CANNOT...

- Contain spaces or these special characters: & ` () = [] ; " ' < >
- Be the same as your user ID
- Be the same as your current password

Your new password must follow these guidelines:



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4. Click “Save and Log Out”

A pop-up window will appear asking you to confirm. Click “Save and Log Out” to complete the process.

Please note:

After clicking “Save and Log Out” you will be automatically signed out of your account. You will then need to sign back in using your new password.

The screenshot shows the 'Edit Password' page in the Edward Jones online client portal. The page has a dark header with the Edward Jones logo and navigation links: Accounts, Messages, Documents, Market Research, and a dropdown menu with 'GV'. There are also language links 'EN | FR' and a 'Log Out' button. The main content area is titled 'Edit Password' and includes a breadcrumb trail: 'Profile Home > Online Access Login > Edit Password'. Under 'Password Criteria', it states: 'Strong passwords are longer and combine upper- and lowercase letters, numbers and special characters.' It then lists requirements for a new case-sensitive password: 8-60 characters, at least 2 letters, at least 1 number or 1 special character, no spaces or special characters like '&' or '()', not the same as the current password, and not the same as any other password on file. Below these are input fields for '*Current Password' and '*New Password', each with a 'Show' link. A confirmation pop-up window is displayed in the foreground, asking 'Save New Password and Log Out?'. It explains that logging out is required to save the new password and that selecting 'cancel' will not change the password. The pop-up has two buttons: 'Cancel' and 'Save and Log Out', with the latter highlighted by a red rectangle.

All done!

Your changes have been saved successfully. Please make a note of your new user ID or password and keep it somewhere safe. The next time you log in, please use your updated credentials.

Need more help? If you have followed the steps in this guide and are still experiencing difficulties, please do not hesitate to reach out to us. Our Online Client Support team is available to assist you:

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