

Signing up - by invitation or on your own

Edward Jones Online Access — Step-by-step guide

Before you begin

To get started, please visit the Online Access login page at: onlineaccess.edwardjones.ca

You will need the following information on hand before you begin:

- Your date of birth
- The email address your Edward Jones Financial Advisor's office has on file for you
- The last four digits of your social insurance number OR your driver's licence number

Step 1 Open the email

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.**

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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

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."

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Online Access Sign-Up

Verify Your Identity

Enrollment Language: English

Account Number: First 8 digits

Date of Birth: YYYY/MM/DD

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

Next

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

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Online Access Sign-Up

Create Your User ID & Password

User ID:

Password: Show Password

Retype Your Password:

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."

Next

Step 2 Terms and conditions

Read the Terms and Conditions before agreeing to them.

1. Click to accept the Terms and Conditions.

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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.horne@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 enrolling in Online Access, you agree to the terms and conditions of the Online Access Agreement, which shall take precedence over any other terms and conditions. The parties have agreed that the Online Access Agreement shall take precedence over any other terms and conditions.

(d) Online Access may contain links to third-party sites or materials. The parties have agreed that the Online Access Agreement shall take precedence over any other terms and conditions.

(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
Monday - Friday 8 a.m. - 8 p.m. ET

Step 3 Select your security preference

Sign up for text messaging.

The screenshot shows the 'Online Access Setup' page with the title 'Select Your Security Preference'. There are five progress dots, with the third dot (representing this step) being filled. Two options are available: 'Enrol in Texting' (selected with a blue radio button) and 'Setup Security Questions' (unselected with a grey radio button). Below the 'Enrol in Texting' option, it says 'Enrolling in texting lets you:' followed by a bulleted list: 'Text with your Edward Jones office', 'Sign in to Online Access with additional security choices', and 'Sign up for text alerts'. A blue 'Continue' button is at the bottom.

3. Enter the verification code you received by text.

4. Click “Log In.”

The screenshot shows the 'Enter Your Code' page. It states 'A six-digit code was sent to mobile phone XXX-XXX-2142.' There is a text input field labeled 'Six-digit Code' (marked with a red circle 3) and a 'Remember this device' checkbox. Below the input field is a 'Log In' button (marked with a red circle 4). At the bottom, there are links for 'Resend Code' and 'Select New Delivery Option', and a footer with 'Support', 'Disclosures', 'Privacy & Security Center', and a copyright notice.

1. Verify your mobile phone number.
2. Click “Send Verification Text” to consent to the terms.

The screenshot shows the 'Online Access Sign-Up' page with the title 'Verify Your Mobile Phone'. It asks to 'Enter a 10-digit phone number that can receive text messages' and provides an example '1234567890'. A note mentions that some branch texts could be considered marketing. It states that two-factor authentication will be received via short code 64254. A text input field for the 'Mobile Phone Number' is highlighted with a red box and a red circle 1. Below it is a link 'Set up challenge questions instead.' and a section titled 'Terms and Conditions' with a button 'I have read and agree to the terms' (marked with a red circle 2) and a 'Send Verification Text' button. A 'I decline' link is at the bottom.



You can choose from two security options:

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

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.

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Online Access Setup

Security Questions

1

Question 1

Select One

Enter your answer

Question 2

Select One

Enter your answer

Question 3

Select One

Enter your answer

2

Complete enrolment

[Back](#)

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.