

How to Enrol in E-Delivery

Edward Jones Online Access — Step-by-Step Guide for Existing Users

E-delivery allows you to receive your Edward Jones account documents such as statements, trade confirmations, notices, disclosures, and tax documents electronically rather than by mail.

Before you begin

Please make sure you have the following ready:

- Your Online Access user ID and password
- The email address you would like documents delivered to

Enrolment Steps

Follow these six steps to set up e-delivery for your account documents.

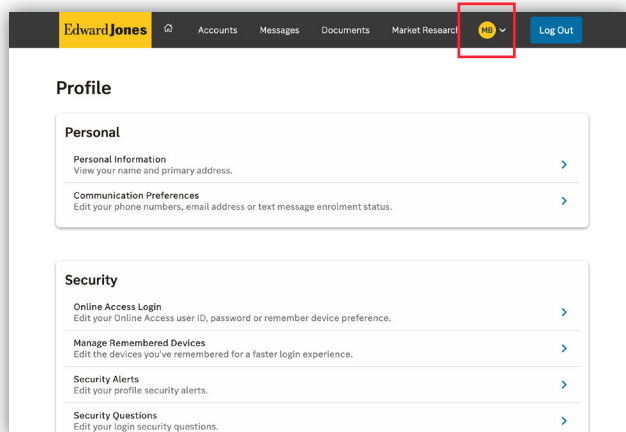
Step 1: Log in to your Online Access account

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

The screenshot shows the Edward Jones Online Access login interface. At the top, the Edward Jones logo is on the left, and the text 'Country: Canada | English' is on the right. The main heading is 'Welcome to Online Access'. Below this are two input fields: 'User ID' and 'Password'. The password field has an eye icon to toggle visibility. Below the password field is a checkbox labeled 'Save user ID on this device' and a blue 'Log In' button. Under the 'Log In' button are links for 'Find Your User ID' and 'Reset your password'. At the bottom left are links for 'Support', 'Disclosures', and 'Privacy & Security Center', followed by a small copyright notice. On the right side, there is a sidebar titled 'New to Online Access?' with a sub-header 'If you're already an Edward Jones client:'. It contains links for 'Sign up', 'Explore what you can see and do', and 'Learn more'. Below these are sections for 'Need help logging in?' with a link to 'View our help guides', and 'New to Edward Jones?' with a link to 'Contact a financial advisor'.

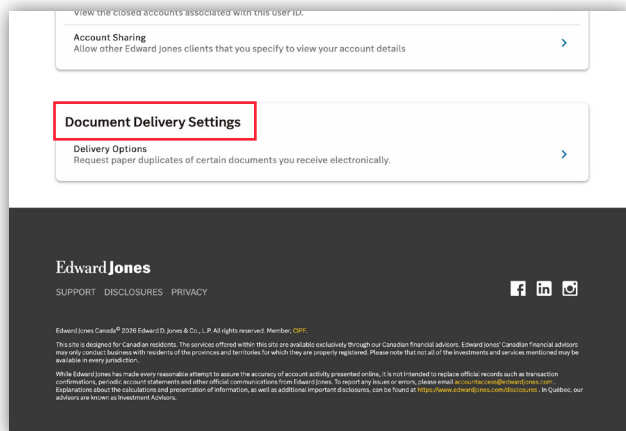
Step 2: Open your profile

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 to open the menu. Click on “Profile”.



Step 3: Go to Delivery Options

Scroll down to the bottom of your profile page until you see the heading “Document Delivery Settings”. Under that heading, click on “Delivery Options”.



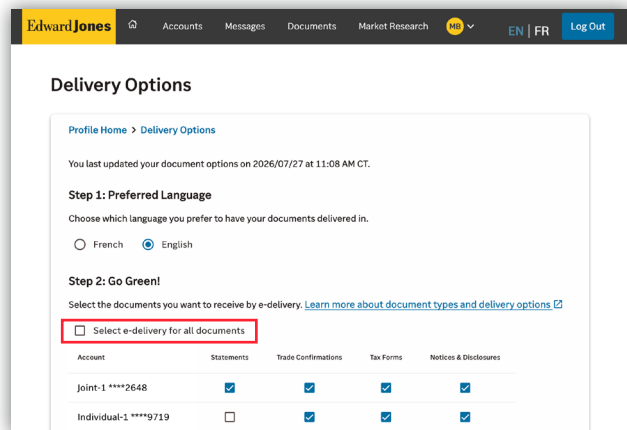
Step 4: Choose your e-delivery preferences

You will be presented with delivery options for your account documents. Choose the option that works best for you:

- **E-delivery for all documents** — Select this option to switch all of your account documents to electronic delivery at once.
- **Customize your preferences** — Select this option if you would like to choose e-delivery for specific accounts or specific document types individually.

Tip:

Selecting e-delivery for all documents is the quickest option and ensures you never miss a document. You can always update your preferences again later if your needs change.



Step 5: Verify or update your email address

Before saving, take a moment to check that the email address shown on screen is correct; this is where your documents will be sent. If it needs to be updated, click “Change” and enter your preferred email address.

Please note:

Make sure this is an email address you check regularly, as important account documents will be delivered there. If you are unsure which address is on file, please contact your local Financial Advisor’s office.

RRSP-1 ****2765 (Closed) Document delivery preferences are not available for closed accounts.

Unchecked boxes indicate physical (paper) delivery unless another authorized party on the account has elected e-delivery. Clicking “Submit” below will set paper delivery for any document types with unchecked boxes.

**For accounts with multiple authorized parties, only the preferences of the authorized party who has most recently updated the e-delivery preferences will be applied to the account.

Step 3: Your Email Address

Email address: esigntest6@edwardjones.com [Change](#)

Step 4: Consent to E-delivery

Scroll and read through the Agreement below or open and read the PDF of the agreement; then check the box and Submit.

[Download Agreement PDF PDF](#)

Edward Jones E-delivery Terms and Conditions

These terms and conditions (“Terms”) govern your receipt of certain account-related information via electronic delivery. By agreeing to these Terms, as well as by viewing or using Edward Jones Online Access (“Online Access”), you accept these Terms. These Terms are in addition to, and do not change or modify, any other agreement between you and Edward Jones, including but not limited to your Edward Jones Account Agreement(s) (“Account Agreement”) and the Online Access Terms and Conditions.

Edward Jones may change these Terms at any time and without notice by updating them on Online Access. You agree that if you use Online Access after these Terms are updated, you will be bound by such change. At the time of a change to these Terms, you have the right to reject such change by canceling E-delivery.

1. E-delivery

You consent to electronic delivery to the email address you have provided in Online Access or to your financial advisor (“Email Address”) of the account-related information you have selected (“E-delivery”). In order to be eligible to receive E-delivery, you will need to verify your Email Address in accordance with our verification processes. You understand

☒ I have read and agree to the Edward Jones Consent to E-delivery

[Discard Changes](#) [Save Changes](#)

Step 6: Read the Terms and Conditions and save your changes

Take a moment to read the Edward Jones E-Delivery Terms and Conditions displayed on the screen. When you are ready, check the box beside:

“I have read and agree to the Edward Jones Consent to E-Delivery.”

Then click “Save Changes” to complete your enrolment.

Email address: esigntest6@edwardjones.com [Change](#)

Step 4: Consent to E-delivery

Scroll and read through the Agreement below or open and read the PDF of the agreement; then check the box and Submit.

[Download Agreement PDF PDF](#)

Edward Jones E-delivery Terms and Conditions

These terms and conditions (“Terms”) govern your receipt of certain account-related information via electronic delivery. By agreeing to these Terms, as well as by viewing or using Edward Jones Online Access (“Online Access”), you accept these Terms. These Terms are in addition to, and do not change or modify, any other agreement between you and Edward Jones, including but not limited to your Edward Jones Account Agreement(s) (“Account Agreement”) and the Online Access Terms and Conditions.

Edward Jones may change these Terms at any time and without notice by updating them on Online Access. You agree that if you use Online Access after these Terms are updated, you will be bound by such change. At the time of a change to these Terms, you have the right to reject such change by canceling E-delivery.

1. E-delivery

You consent to electronic delivery to the email address you have provided in Online Access or to your financial advisor (“Email Address”) of the account-related information you have selected (“E-delivery”). In order to be eligible to receive E-delivery, you will need to verify your Email Address in accordance with our verification processes. You understand

☒ I have read and agree to the Edward Jones Consent to E-delivery

[Discard Changes](#) [Save Changes](#)



You are now enrolled in e-delivery!

Your e-delivery settings have been saved. Going forward, your selected account documents will be delivered electronically to your email address rather than by mail. You can update your preferences at any time by returning to the Delivery Options section of your profile.

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.