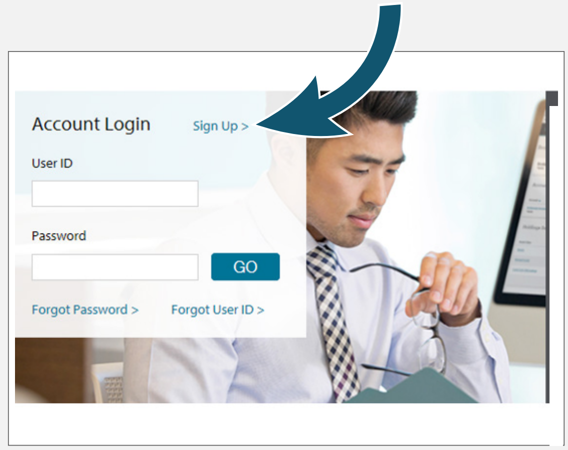
Self-enrollment for TradePMR Access Online

Go to **https://tradepmr.fccaccessonline.com** and select **"Sign Up"**

(note the "s" in the "https://" prefix for this address)

Clients can self-enroll in Individual, Joint and IRA accounts only and are unable to enroll in other accounts (e.g. Trust, 529's, etc.).

To enroll in other account types or for enrollment assistance, please contact **Access Online Support** at 1-888-889-1401, available 24 hours a day, 7 days a week.



1

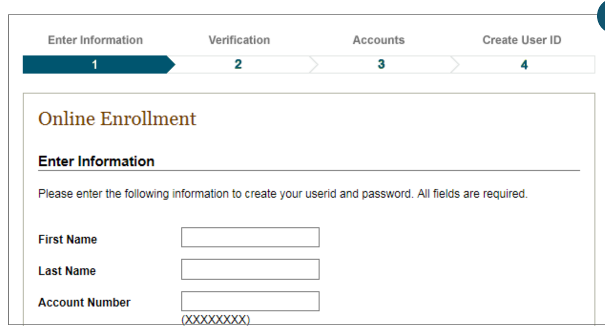
*E*nter the following into the form:

- First Name
- Last Name
- 8-digit Account Number
- Date of Birth
- Social Security Number
- State
- Zip Code

Then click the "Next" button.

If you do not know your new account number, contact your Advisor.

1



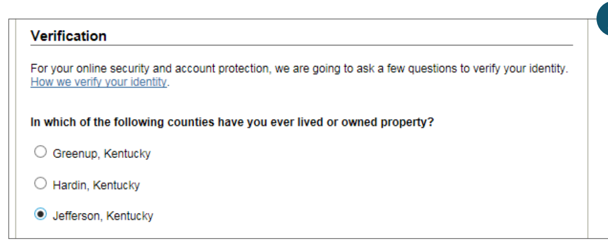
2

For online security and account protection purposes, you will be asked multiple questions to verify your identity.

Once all questions are answered correctly, please hit the "Next" button.

If you answered incorrectly and cannot get access, call the Client Services Center (open 24/7) at 1-888-889-1401 to establish access.

2



3

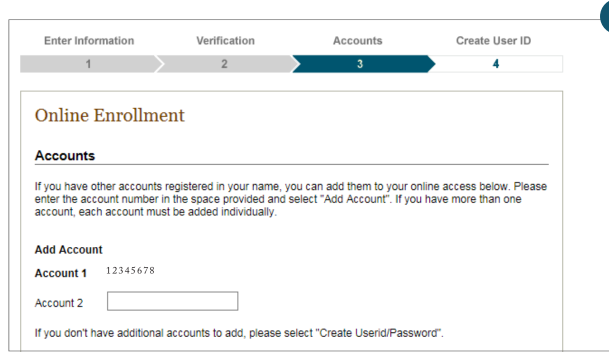
If you have more accounts you want to view online, add each account number individually on this screen.

To add an account, enter your 8-digit account number in the field, and hit the "Add account" button. If you do not know your new account number, contact your Financial Advisor.

Once all your account numbers have been entered, or if you have no additional accounts to add, click on the "Create UserID/ Password" button to continue.

If you receive an error message that an *"account number you entered is not eligible for association with your UserID"* when trying to link an account to your online access, **call the Client Services Center at 1-888-889-1401.**

3

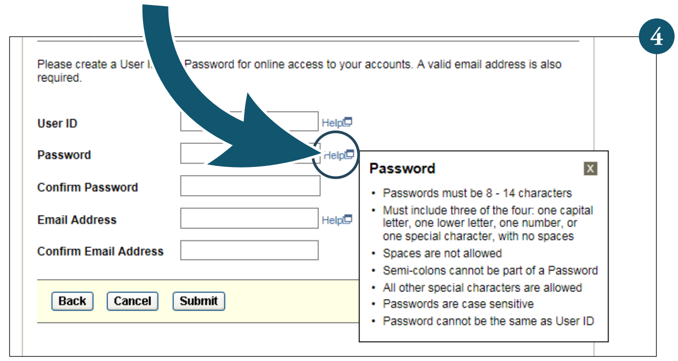


Enroll for TradePMR Access Online

4 Create your User ID and password for your online account.

Click the “Help” button for more information and password requirements.

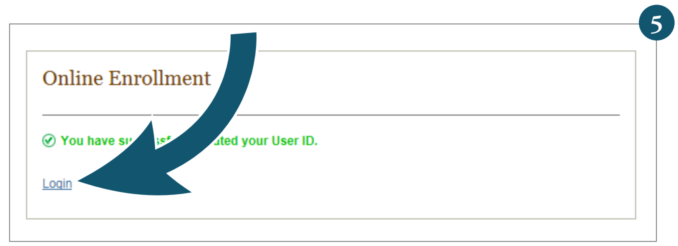
To continue, click “Submit.”



5 Once you hit “Submit” you should see a message on the screen telling you that “You have successfully created your User ID.”

To continue, click “Login” at the bottom of the screen.

Login in using your new User ID and password, created in Step 4, and click “Go.”

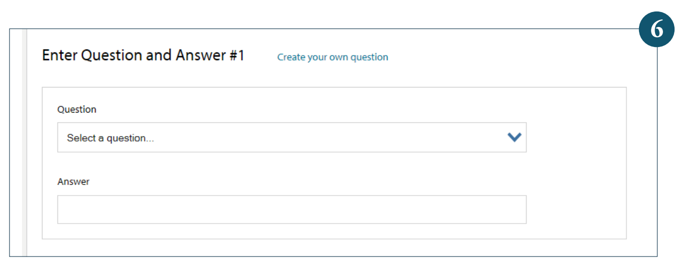


6 You will be asked to create three security questions.

You can pick a question from the dropdown list or create your own question by clicking the link.

Please note: all answers must be at least four characters (including spaces) and no two answers can match.

Answers are not case-sensitive.



7 You will be taken to a page that outlines the features of the new TradePMR Access Online experience before going to the agreement. You can skip the tour by clicking “Get Started” at the top of the page.

Next, you will be taken to the online access agreement. After you have reviewed the online terms and conditions, you will need to check **all the boxes** for Online Access Agreement, NYSE, NASDAQ, and OPRA at the bottom of the screen.

Click on the Submit box to continue to your online account.