

Self-enrollment for TradePMR Access Online

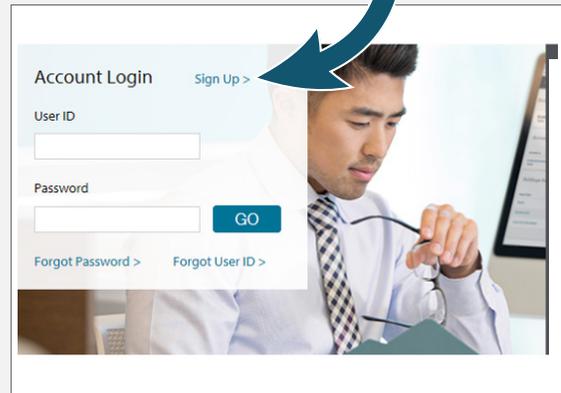
Go to

<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 Enter 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.

A screenshot of the 'Online Enrollment' form. At the top, there is a progress bar with four steps: 'Enter Information' (1), 'Verification' (2), 'Accounts' (3), and 'Create User ID' (4). Step 1 is highlighted. Below the progress bar, the title 'Online Enrollment' is followed by the sub-header 'Enter Information'. A message says: 'Please enter the following information to create your userid and password. All fields are required.' There are three input fields: 'First Name', 'Last Name', and 'Account Number' (with a placeholder '(XXXXXXXX)').

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.

A screenshot of the 'Verification' step of the 'Online Enrollment' form. The progress bar at the top shows step 2 'Verification' highlighted. The sub-header is 'Verification'. A message says: 'For your online security and account protection, we are going to ask a few questions to verify your identity. [How we verify your identity.](#)' Below this is the question: 'In which of the following counties have you ever lived or owned property?' There are three radio button options: 'Greenup, Kentucky', 'Hardin, Kentucky', and 'Jefferson, Kentucky' (which is selected).

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.**

A screenshot of the 'Accounts' step of the 'Online Enrollment' form. The progress bar at the top shows step 3 'Accounts' highlighted. The sub-header is 'Accounts'. A message says: 'If you have other accounts registered in your name, you can add them to your online access below. Please enter the account number in the space provided and select “Add Account”. If you have more than one account, each account must be added individually.' Below this is the 'Add Account' section with two rows: 'Account 1' with the value '12345678' and 'Account 2' with an empty input field. At the bottom, there is a note: 'If you don't have additional accounts to add, please select “Create UserID/Password”.'

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.

This screenshot shows a form titled "Please create a User ID and Password for online access to your accounts. A valid email address is also required." The form includes fields for User ID, Password, Confirm Password, Email Address, and Confirm Email Address, each with a "Help" link. A "Submit" button is highlighted in yellow. A "Password" pop-up window is open, listing requirements: 8-14 characters, three types of characters (capital, lower, number/special), no spaces or semi-colons, case sensitivity, and uniqueness from the User ID.

This screenshot shows a green success message: "You have successfully created your User ID." Below the message is a "Login" link.

This screenshot shows a form for creating a security question. It has a dropdown menu for "Question" and a text input for "Answer". A link "Create your own question" is visible in the top right.

This screenshot shows a welcome message: "Welcome to Access Online! Get Started" with a link. Below it, a smaller text block says: "Here you'll find tools to help you manage your investments and reach your financial goals. Before you get started you'll need to accept the subscriber agreement."

This screenshot shows the "ONLINE ACCESS AGREEMENT" page. It includes a "Step 1: Agreement Acceptance" indicator, a "1" in a circle, and a "Get Started" link. The main content area contains the agreement text, including definitions for "us", "our", "you", "your", "Authorized Representative", and "Business Day". At the bottom, there are checkboxes for "Online Access Agreement", "NYSE", "NASDAQ", and "OPRA", along with "Cancel" and "Submit" buttons.