



Client Access Support Team
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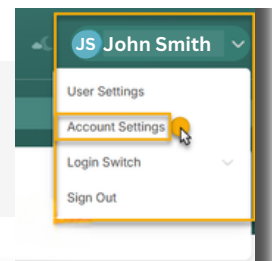
Guest Access

Guest Access allows you to share your account information with others in your household or other D.A. Davidson Client Access users. Relationships can change over time and guest access allows you to easily control who has access to view your accounts in the digital space.

Guest Access permits others to see all information for the specified account(s), including, but not limited to, the following: account number, account registration, total account value (current and historic), cash and money market fund value, market value, security type breakdown, asset class, realized gain/loss, all account activity, and up to two years of historical Client Communications.

Getting Started

Start by visiting your "Account Settings" in the upper right hand corner by clicking on your name.



Primary Accounts

Account Nickname	Guest Access Granted To
XXXX	Joint Account
XXXX	IRA

Under the Primary account section, click on the pencil icon to the right. Enter the existing username of the individual you want to provide guest access to your account(s) in the field next to it, and click the floppy disk icon to save. You and your guest user will both receive an email confirming the granting of Guest Access to your account(s).

Primary Accounts

Account Nickname	Guest Access Granted To
XXXX	Joint Account
XXXX	IRA