

# Client Access Site | Electronic Delivery Options for Statements, Trade Confirmations & Tax Receipts

## Let's Get Started!

1. Once you have signed up for online access, you can take the next step and sign up for electronic statements, trade confirmations and tax receipts and administer any changes to your profile on the "My Profile" page.

2. Click [here](https://client.raymondjames.ca/) to access the Raymond James client site. (<https://client.raymondjames.ca/>)

3. Enter your username and password, and click **SIGN IN**.

**Note:** Click Remember Username.

4. Click **MY PROFILE**, and then select **Document Settings** to access Document Delivery options.

**Note:** You have the option of Electronic or Paper delivery. If you have chosen a mix options, you will see the 'Mixed' toggle enabled to the right of the document type.

### Document Delivery Options

**Paper Delivery:** Paper documents will be sent to you by posted mail, no email notifications will be sent. Documents can still be accessed via the Client Access Site.

**Electronic Delivery:** Paper documents will no longer be mailed to you. Email notifications will be sent when new documents are available. Documents can be downloaded and/or printed via the Client Access Site.

**Note:** If you have selected a combination of these two delivery methods for different documents, you will see the Mixed Delivery option.

4. Under **Document Settings**, click on the toggle to select either Electronic or Paper delivery. You can choose to:

A. Change the delivery options for all documents at the same time (Statements, Trade Confirmations, & Tax Receipts).

B. Change the delivery options for a specific type of document.

C. Choose to change the delivery options for specific accounts within a specific document. Click the down arrow to view all accounts.

5. Once you have made your selections, click **SAVE** to update document delivery settings, review the Document Delivery Service Agreement, and then click **I AGREE** to finalize your changes.

**Note:** You will receive an email notification and mailed letter that will confirm any changes made to your document delivery preferences.