

# Self-Enrollment for Access Online



Visit <https://tradepmr.fccaccessonline.com> and select **Sign Up**.

For enrollment assistance, please contact **Client Services Center at 1-888-889-1401**, available Monday - Friday 8 a.m. to 12 a.m. EST, and Saturday - Sunday 9 a.m. to 6 p.m. EST.

Clients are unable to self-enroll Monday - Saturday 9 p.m. to 6 a.m. EST due to nightly technology maintenance activities.

**Please note:** Clients can sign-in to view their accounts during this time (just not self-enroll as a new user).

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.*

2

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

Once all questions are answered correctly, click the **Next** button.

*If you answered incorrectly and cannot get access, call the Client Services Center at 1-888-889-1401 to establish access.*

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 click 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.

Be sure your password **DOES NOT** include the "@" symbol or use more than three repeating characters, i.e. "aaa" or "1111."

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**.

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**.

Please create a User ID and Password for online access to your accounts. A valid email address is also required.

User ID  [Help](#)

Password  [Help](#)

Confirm Password

Email Address  [Help](#)

Confirm Email Address

[Back](#) [Cancel](#) [Submit](#)

Please review the guidelines below before changing your password.

- Passwords should be 8 to 14 Characters.
- Password should include fewer than 9 numbers.
- Passwords shouldn't include more than 3 Repeating Patterns (aaaa, 1111).
- Passwords shouldn't include more than 3 Sequential Numbers or Letters (i.e. 1234 or abcd).
- Passwords shouldn't contain spaces.
- Passwords shouldn't be same as User ID.
- Passwords shouldn't include Semi-Colons.
- Passwords shouldn't reuse any one of the last 6 Passwords.

**PASSWORD MUST CONTAIN:**

- 8 to 14 characters
- At least one upper case letter
- At least one lower case letter
- At least one number
- At least one of the following special characters (!, \$, %, \_, #, ^ or \*)

**PASSWORD CANNOT CONTAIN:**

- Your first name, last name, email address, User ID, or spaces
- Your previous 6 passwords
- The name of a month (for example: march123)
- More than 3 repeating characters (for example: 1111, aaaa)
- More than 3 consecutive characters (for example: 1234, ABCD)
- Commonly used words or phrases (for example: password)
- More than 8 numbers
- @ symbol

5

Once you click **Submit**, you should see a message on the screen telling you: **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**.

Online Enrollment

✔ You have successfully created your User ID.

[Login](#)

6

You will be asked to create three security questions.

You can pick a question from the drop-down 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.

Enter Question and Answer #1 [Create your own question](#)

Question

Select a question... ▾

Answer

7

You will be taken to a page that outlines the features of the new 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, check all the boxes for Online Access Agreement, NYSE, NASDAQ, and OPRA at the bottom of the screen.

Click on the **Submit** button to continue to your online account.

Welcome to Access Online! [Get Started](#)

Have 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.

1 Step 1: Agreement Acceptance

ONLINE ACCESS AGREEMENT

This Online Access Agreement (the "Agreement") provides the terms and conditions of the Service.