



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.

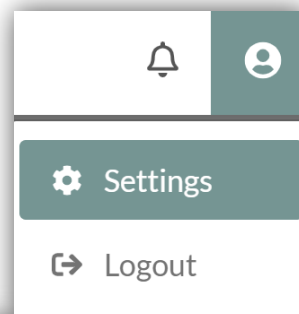
Getting Started

Start by visiting your "User Settings" in the upper right hand corner.

Under "Account Management" you will click on "Guest Accounts"

Enter the existing username of the individual you want to provide guest access your account(s) to. Then, select the account(s) you would like to grant guest access to and click "Save".

You and your guest user will both receive an email confirming the granting of Guest Access to your account(s).



ACCOUNT MANAGEMENT



Account Settings

label account(s) & select a default account at login



Guest Accounts


designate and manage your guest accounts

GRANT GUEST ACCESS

Select accounts to grant read only access to the accounts you chose

Guest's Username:

My Accounts:

Select an option 

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