

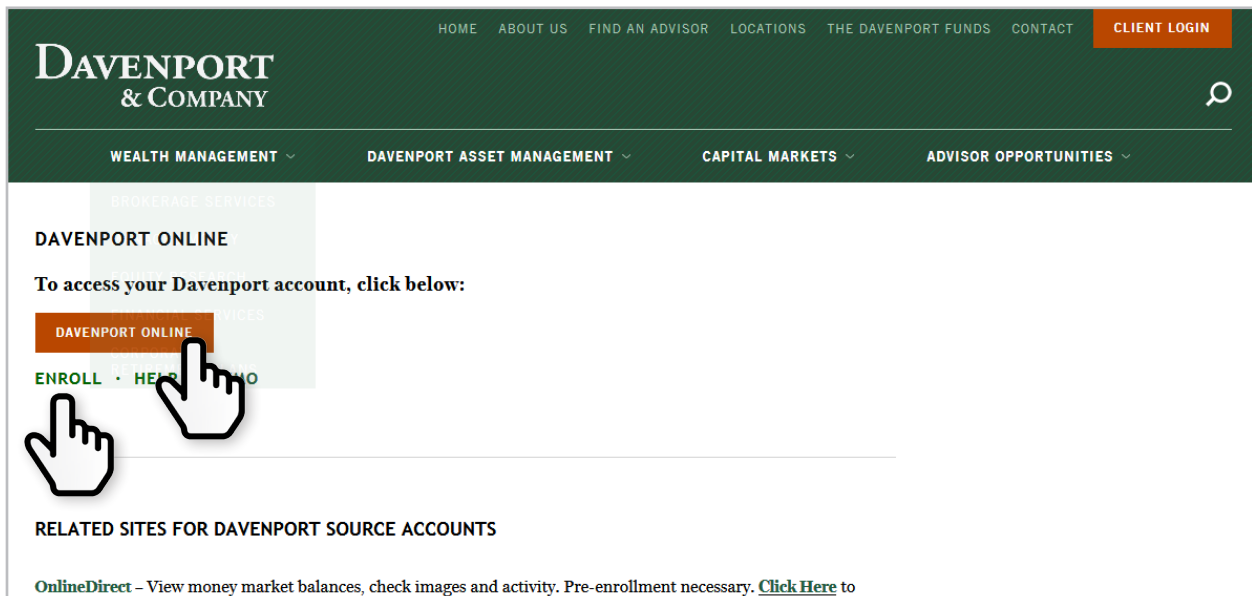
Davenport Online

FOR CONVENIENT 24-HOUR ACCESS TO YOUR ACCOUNT

To access the site, go to www.investdavenport.com. Click on the “Client Login” link, located in the orange box in the top right-hand corner.



You will be directed to the page shown below. To log into your Davenport Online Account, click the orange Davenport Online link. To enroll, click the Enroll link.



Once you have clicked on the Enroll link, you will be taken to a new screen. Here you will enter the appropriate user information.

There is not an option when enrolling to add more accounts to your login ID. If your accounts are linked for household purposes, they will be synced with your login ID. If they don't sync, please call us to manually add them for you.

When entering your SSN or EIN in the "Accounts to Link" field, include dashes (ex: 999-99-9999 or 99-9999999). Also be sure to enter the SSN or EIN number that matches what is on the Account Information for the specific account you are enrolling with.

Once you have completed the fields on the "Enroll" page, click the green "Continue" button, in the bottom right-hand corner.

Enroll

User Information

First Name

Middle Initial

Last Name

SSN/Tax ID (xxx-xx-xxxx)

E-Mail

Confirm E-Mail

If you are registering an account with a Tax ID instead of a Social Security Number, please format the Tax ID as XX-XXXXXXX

Website Access

User Name (At least 4 characters)

Password (At least 8 characters)

Confirm Password

Account

Are you the account owner? Yes No

Account Number (XXXXXXXX)

[Continue](#)



You will be directed to a page that looks like this:

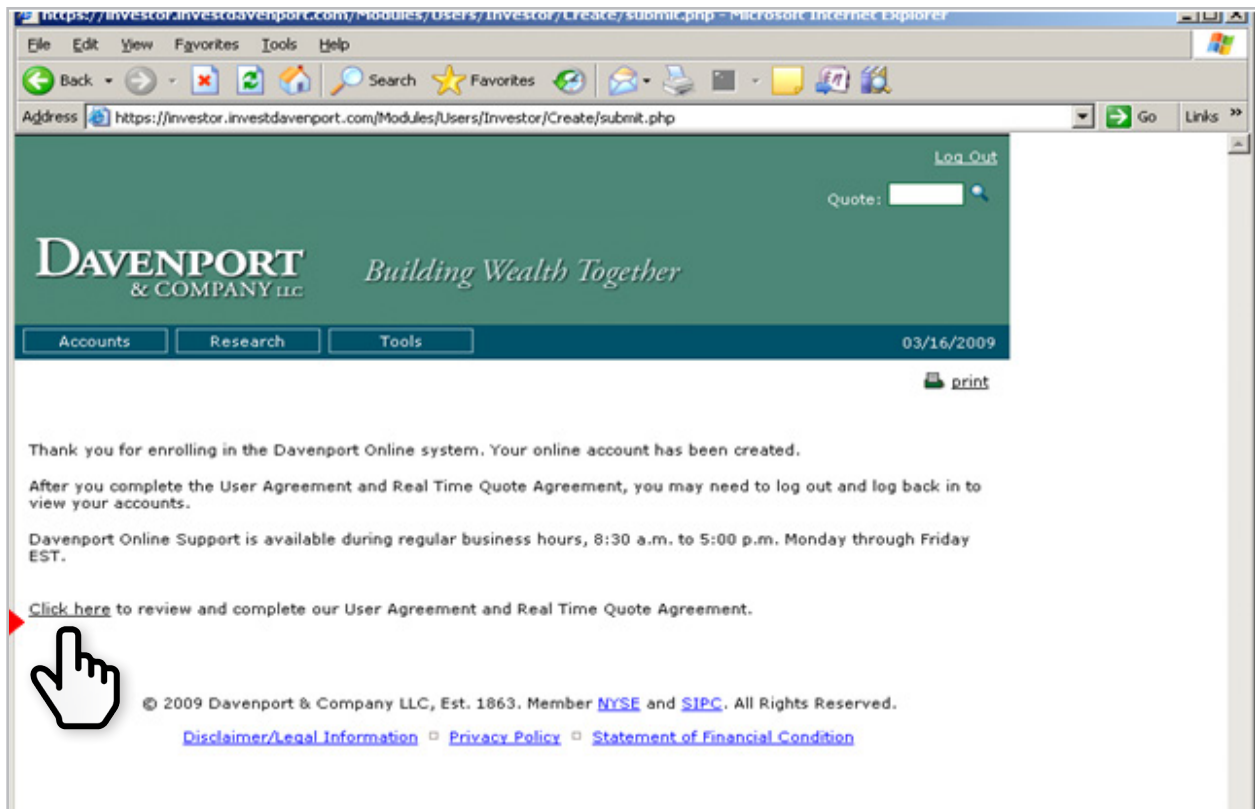
User Information	
First Name	Ken
Middle Initial	A
Last Name	Smith
E-Mail	Ken.Smith@gmail.com
Website Access	
User Name	KSmith456
Password Reminder Question	What town were you born in?
Accounts to Link	
Account Number	Nickname
12345678	Individual



Click on the “Enroll” button on the bottom right-hand corner.

Click on the “Click Here” link to review and complete the User Agreement and Real Time Quote Agreement.

After Completing the User Agreement, you will be fully enrolled in the system.



SUPPORT

Davenport Online Support is available Monday-Friday, 8:30 a.m. to 5:00 p.m. EST. We may be reached by email at support@investdavenport.com or by calling 1 (888) 742-1863 or (804) 697-2997.

FREQUENTLY ASKED QUESTIONS:

Q. Is it possible to change the first page that appears after logging in to the site?

A. Yes. Go to 'Preferences', which is found under the 'Tools' tab. Click on 'Login Settings' and change the 'Start Page'.

Q. How do I change my password?

A. Access your account using your current password. Click on Tools, then Preferences. Choose the "Change Login Password" preference. Complete fields requesting your current password and your new password. Click on the "Save" button to preserve your changes.

Q. How do I change my e-mail address in Davenport Online?

A. Access your account. Click on Tools, then Preferences. Choose the "Change E-mail Address" item on the left side of the page. Complete the fields, requesting your current e-mail address, your new e-mail address and confirming your new e-mail address. Click on the "Save" button to preserve your changes.

Q. How do I assign a nickname to my account(s)?

A. Access your account. Click on Tools, then Preferences. Choose the "Account Nicknames" item on the left side for the page. Complete the nickname you would like to associate with each account number listed. Lastly, please click on the "Save" button to preserve your changes. Special Characters can't be entered in this field.

Q. How do I add an account to my existing online access?

A. This can only be done by speaking with your Financial Advisor or by contacting us directly to manually add an account.

Q. I have multiple accounts; however, I am able to access only one. How do I access others?

A. There is a drop-down box provided a ¼ of the way down the page, on the left, that contains a list of all accounts for which you have set up access.

Q. How do I see an overview of all accounts, including account balances, for which I have access?

A. This information may be viewed by going to 'Household Overview', which is found under the "Accounts" tab.

Q. How do I view account balances, positions, activity, and gains/losses?

A. This information is found under the 'Accounts' tab. Here you will find a list of account information options.

Q. Can I access market related information such as quotes, charts, and company profiles?

A. Yes, this information is found under the 'Research' tab.

Q. How do I get a quote?

A. A quote box can be found below the 'Log Out' button, on the top right corner of each page.

Q. How do I view the status of orders in my account?

A. This information is found on the 'Order Status' page under 'Accounts'. This information is based on a 15 to 20 minute delay, please be sure to refresh your page.