

Self-Enrollment - Quick Guide



Client Access Support Team

1-800-575-9503

clientaccesshelp@dadco.com

Client Access Login

To begin the Self-Enrollment process, you will need to visit our client login page which can be found at access.davidsoncompanies.com. If you experience any issues with logging in, enrolling your account, or with usernames or passwords, please contact:

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Enroll in Client Access

90 D|A|DAVIDSON

Log in to access your D.A. Davidson Accounts

Username

Password

Enroll in Client Access

Forgot Password?

Log in

By logging in, you acknowledge you have read and agree to the [Client Access Terms of Use](#) and to the use of anonymous cookies as described in the [Privacy Policy](#).

M-F 6:00 AM - 5:00 PM MT
1-800-575-9503
ClientAccessHelp@dadco.com

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Self-Enrollment

If you have the following, you are ready to get started.

- ✓ Your Social Security Number ⓘ
- ✓ Your Date of Birth
- ✓ Your D.A. Davidson Account Number
- ✓ Your Zip Code ⓘ
- ✓ Your Email Address

Enroll Now

This is the first screen you will encounter when you start enrolling your accounts. Contact your Financial Professional Team Associate if you need help with gathering your account details



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Client Access Enrollment

Fill out this form with the last four digits of your social security number, your date of birth, your account number (**numerals only**), your zip code, and acknowledge that you have read and agreed to the Client Access Terms of Use.

Online Enrollment / Login Information

Login Information

Please set your Client Access login credentials.

Username

Email

Password

Confirm Password

☒ **eDelivery:** Please save paper by delivering all eligible documents electronically.

☐ User has read and agrees to the eDelivery Consent Terms .

Next

Login Information

Create your Username and Password for your Client Access login. Enter your preferred email address and select your eDelivery preferences.

Username Requirements:

- Be between 8 and 20 characters long
- Contain at least one letter
- Not be the same as your password
- Can only contain these special characters: hyphen (-), underscore (_), period (.), and commercial at sign (@).

Password Requirements:

- Between 8 and 20 characters long
- Contain one upper letter, one lower case letter, and one number
- Can't contain special characters: (& , ' , " , > , < , [,] , { , } , ' , ' , ? , / , \ , | , ~)



Self-Enrollment / Online Enrollment

Last Four Digits of Social Security Number (SSN):

XXX-XX-

☐ I do not have a SSN

Date of Birth:

MM/DD/YYYY

Account Number:

Zip Code:

☐ I do not live in the U.S.

☐ By checking this box, you acknowledge you have read and agree to the [Client Access Terms of Use](#).

Submit

Verify Email Address

A verification code has been sent to your email address

@dxxxx.xxx

Enter your code and click verify to complete verification

1

Resend code

Submit

Verify Email

Enter the verification code that was sent to the email address you entered on the previous screen.

Security Questions

Here you will be required to select security questions and fill out your answers.

Question and Answer Requirements:

- Cannot contain these special characters: (& , ' , " , > , < , [,] , { , } , ' , ' , ? , / , \ , | , ~)

Login Information / Security Questions

Security Questions

Please create two security questions that you can remember the answers to in case we need to verify your identity.

Question 1:

Select a Question

Answer 1:

Question 2:

Select a Question

Answer 2:

Next

Select a Question

- What is the name of your favorite book?
- What is the name of your favorite sports team?
- What is the name of your first car?
- What is your favorite color?
- What is your favorite vacation location?
- What is your mother's maiden name?



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Security Questions / Add Mobile

Add Mobile Number

Your email address will be used for multi-factor authentication. If you would like to receive authentication codes via text, provide your mobile number by selecting Add Now. Otherwise, select Continue Login.

Continue Login

Add Now

Add Mobile Number

You can choose to add a text capable mobile number or continue without. If you choose to add your mobile number, you can select this as your primary verification method or deselect to keep your email as the primary method

Security Questions / Add Mobile

Add Mobile Number

Mobile Number

☒ Select this box to use your mobile number as the default method for multi-factor authentication.

Submit

Verify Mobile Number

A verification code has been sent to your mobile number

(XXX) XXX-XXXX

Enter your code and click verify to complete verification

Resend code as text message:(XXX) XXX-XXXX

Resend code via voice call:(XXX) XXX-XXXX

Submit

Verify the mobile number by using the six-digit verification code you received.

Your D.A. Davidson Companies verification code is: 123456

Enrollment Complete

Once you have successfully enrolled your account(s) you will see a list of details regarding your enrollment; your username, list of your accounts based on your SSN, and your indicated eDelivery preference.

Please Note:

You will notice a zero balance on newly enrolled accounts the first day they are online. Your balances will load on the following business day. US Market Holidays can delay this process.