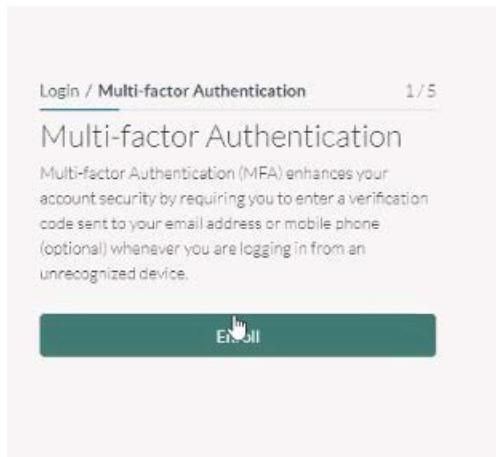
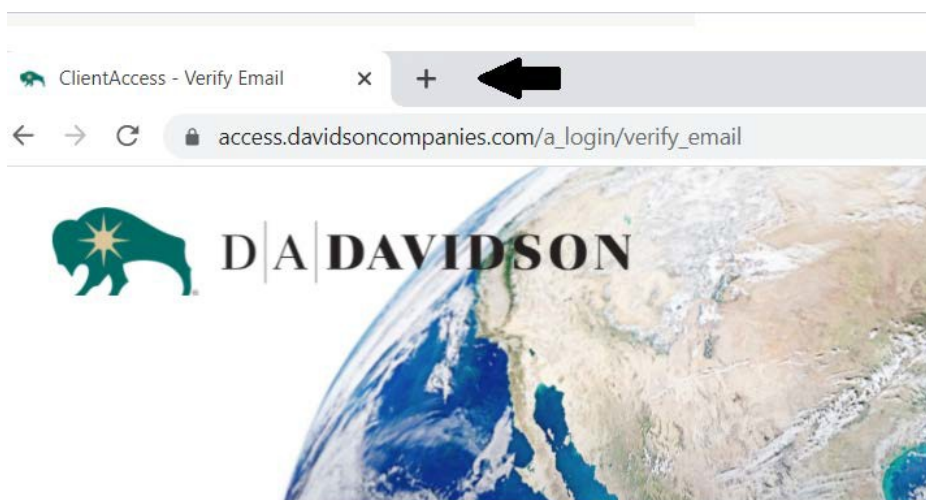


## Setting up Multi-Factor Authentication

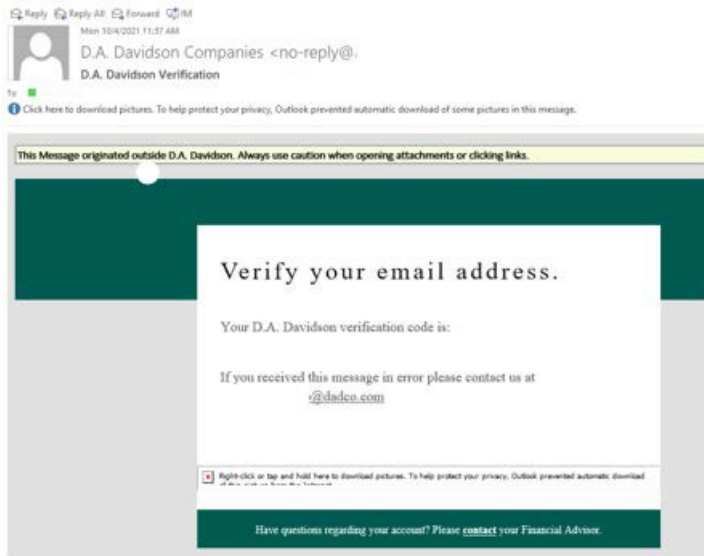
1. Log in with your username and password
2. If not already enrolled, you will be prompted to enroll in Multi-Factor Authentication. Click “Enroll”



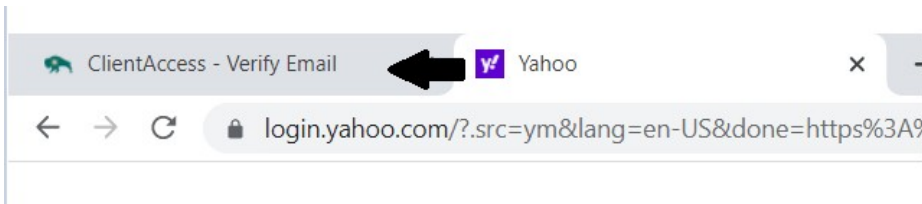
3. An Email will be sent to your email address on file with a verification code. Without closing the screen that the Davidson Client Access page is on, open a new tab, by clicking on the plus (+) sign at the top of your browser window.



4. This will open a new window. From this window, please log into your email account and look for an email from D.A. Davidson Companies. Make note of the verification code given. This code is only good for 10 minutes.



5. Return to the Client Access window by clicking on the Client Access tab at the top of the browser page.



6. Enter the 6-digit code from the email you received and click “Verify”.

Multi-factor Authentication / **Verify Email** 2 / 5

### Verify Email

A verification code has been sent to your email address  
it00x@d000x.c0xx

Enter your code and click verify to complete verification.

**Verify**

Didn't receive the code?

[Resend Code](#) [Use a Different Email Address](#)

7. You will be given the option to receive future codes using your mobile device/cellphone. If you would prefer getting the code via your mobile number, click “Add Now”, **if not**, click “Continue Login” and go to **Step 9** in this document.

Verify Email / **Add Mobile Number** 3 / 5

### Add Mobile Number

Your email address is set up for Multi-factor Authentication.

Do you want to add mobile number as another method to receive verification codes?

**Continue Login** **Add Now**

### Add Mobile Number

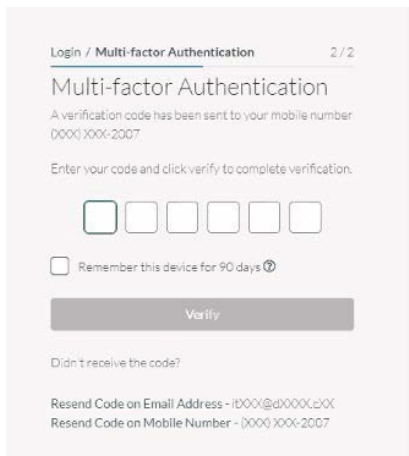
Mobile Number:

You will be required to verify this Mobile Number

Add as Primary ⓘ

**Cancel** **Next**

8. If you chose to add your mobile number, you will be prompted to enter a verification code after you entered your mobile number. Enter the code received by text message to your mobile number. If you check the box next to “Remember this device for 90 days” you will not have to verify with a code again for the next 90 days. Click “Verify” to complete login.



Login / Multi-factor Authentication 2 / 2

### Multi-factor Authentication

A verification code has been sent to your mobile number  
(XXX) XXX-2007

Enter your code and click verify to complete verification.

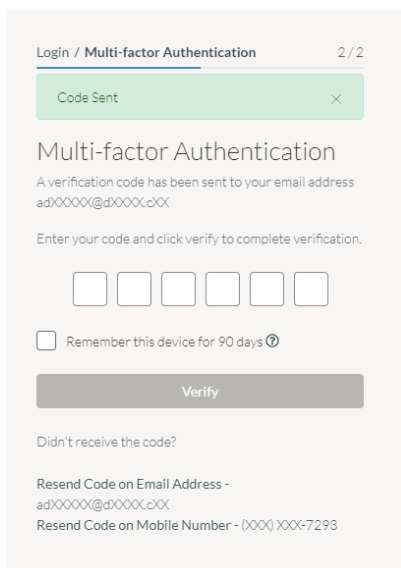
Remember this device for 90 days ⓘ

Verify

Didn't receive the code?

Resend Code on Email Address - (XXX) XXX-2007  
Resend Code on Mobile Number - (XXX) XXX-2007

9. If you did not add a mobile number to authenticate your login, you will be prompted one more time to enter a verification code. Please check your email for the new authentication code. When entering the code, you will be given the option to “Remember this device for 90 days” if you check the box, you will not be prompted for another code for the next 90 days. Click “Verify” to complete login.



Login / Multi-factor Authentication 2 / 2

Code Sent ×

### Multi-factor Authentication

A verification code has been sent to your email address  
adXXXX@dXXXX.cXX

Enter your code and click verify to complete verification.

Remember this device for 90 days ⓘ

Verify

Didn't receive the code?

Resend Code on Email Address -  
adXXXX@dXXXX.cXX  
Resend Code on Mobile Number - (XXX) XXX-7293