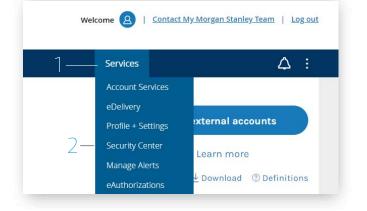
## Morgan Stanley

# Provide Others View-Only Access to Your Online Account

On Morgan Stanley Online, you have the ability to provide a third-party user — for example, accountants or attorneys — access to see your account information and download relevant account documents. While third-party users can have access to the accounts you specify, they cannot perform transactions like trading, transferring money or paying bills.

### **Navigating to Third Party Management**

- 1. Log in and navigate to Services.
- 2. Select "Security Center."



3. Navigate to Third Party Management and click Edit.

Third party management		
Account access	3 —	Edit
Provide trusted individuals view only access to the account of your choice.		

#### Adding a Third Party User

- 1. Click Add new user
- **2.** Provide the requested information, including user name, password and account access, you want this Third Party User to have.
- **3.** You will be required to agree to the terms and conditions of the **Third Party User Management Agreement**.

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#### Editing or Removing a Third Party User

- Navigate to Services, select Security Center, navigate to Third Party Management and click Edit.
- **2.** Click **Edit** or **Delete** next to the Third Party User you wish to change.
  - Edit: Provide the requested information and click **Save**.
  - Remove: Click Delete on the Delete This Third Party User pop-up.

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#### ADDITIONAL HELP AND SUPPORT

If you need assistance, please contact the Client Service Center at 1 (888) 454-3965 (24 hours a day, 7 days a week). If you are outside the United States, you can call collect at 1 (801) 617-9150.

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04/02/2018

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