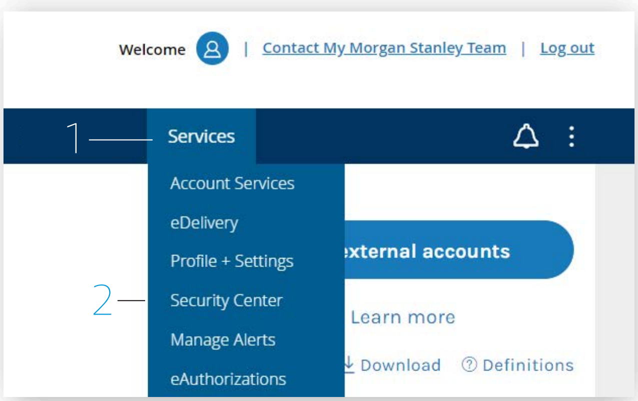
Morgan Stanley

Provide Others View-Only Access to Your Online Account

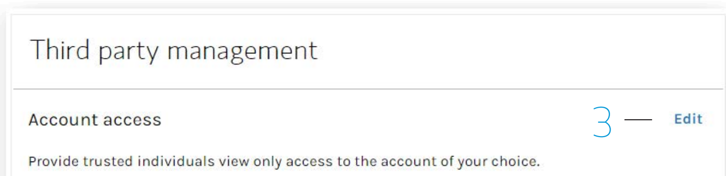
On Morgan Stanley Online, you have the ability to provide a third-party user — for example, accountants or attorneys — access to see your account information and download relevant account documents. While third-party users can have access to the accounts you specify, they cannot perform transactions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

Navigating to Third Party Management

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

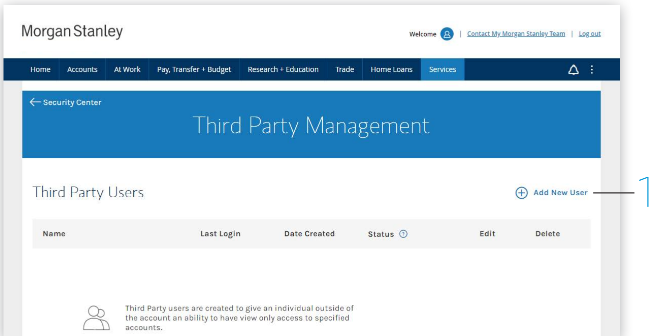


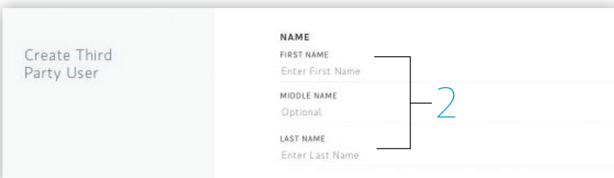
3. Navigate to **Third Party Management** and click **Edit.**

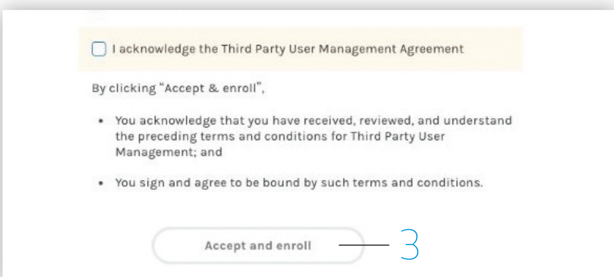


Adding a Third Party User

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**.

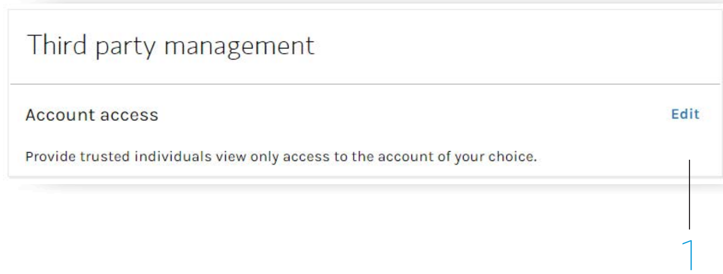


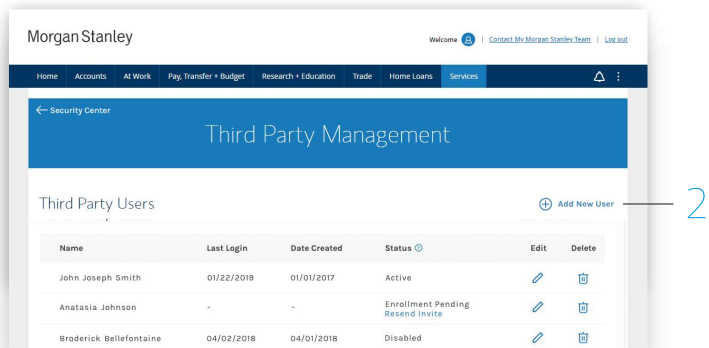




Editing or Removing a Third Party User

1. 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.





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.