Trade authorization

Give the person you designate the authority to make trades in your account.

Depending on your individual situation, you may want to give someone full or limited trading authorization in your account. At Edward Jones, we'll work with you to select an option that makes sense for you. In general, people grant trading authorization to a spouse, another family member or possibly another trusted person.

A trade authorization gives the person you designate the authority to do any or all of the following in your account:

- Buy, sell and trade your securities
- Request delivery of securities and payment to you via check request only
- Sign checks on your behalf

You control the type of authorization

You can control how much authority you grant by making the appropriate selections on your form:

- **Full trading authorization** – Allow all of the above activities
- **Limited trading authorization** – Allow one or two of the above activities

Trading authorization is allowed on the following account types:

- Individual
- Joint
- Inherited IRA
- Traditional IRA
- SEP IRA
- SIMPLE IRA
- Roth IRA

If you have an Advisory Solutions Fund Model or Unified Managed Account Model, you may authorize another individual to receive account information or make deposits and withdrawals on your behalf.

Give Feedback

How we can help

If you're interested in granting someone else trade authorization on one or more of your accounts, talk with your Edward Jones financial advisor to learn more.

Client resource center

Online Access and account features

Edward Jones Perspective Newsletter

Tax resources and client statements

Contacting us in an emergency

Find a Financial Advisor

Name or location (city, state or ZIP)

Search Financial Advisors

Market Data

DJIA 29,634.83 ↓(-403.89)

S&P 500 3,583.07 ↓(-86.84)

NASDAQ 10,321.39 ↓(-327.76)

Give Feedback

Disclosures

News and Media

Careers

Resources for CPAs and Attorneys

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