

Technical Support:

Contact Pershing Advisor Solutions Customer Service at 1(877) 870-7230 between the hours of 9:00 to 6:00 EST with any inquiries regarding this system

Financial Organization Number (if required): 3CR

Website: advisor.netxinvestor.com

First Time Login

1. Go to: **advisor.netxinvestor.com**
2. In the **User ID** field, type your login ID and click **Continue**.
3. In the **Enter Password** field, type the temporary password and click **Continue**. The **Change Password** section displays.
4. In the **Old Password** field, type the temporary password.
5. In the **New Password** and **Confirm New Password** fields, type the new password.
6. Click **Continue**. The Security Questions page displays.
7. Select four security questions and provide appropriate answers for each of the question.
8. Click **Continue**. The **Security Image** page displays.
9. Select a personalized security image and click **Continue**. The **Security Phrase** page displays.
10. Type your personalized security phrase and click **Continue**. The **Security Review** page displays.
11. Review your selections and click **Continue**. The Go Paperless page displays.
12. Click the **Update Preferences** button to set up your e-delivery instructions.
13. After setting up the e-delivery instructions, the **NetXInvestor** home page displays.

Change Security Questions, Answers and Picture

Change Security Questions And Answers

These questions assist in verifying your identity when logging in from different devices.

Mask Response to Secret Questions

What is the last name of your first grade teacher?

.....

What city were you in when you met your spouse or significant other?

.....

What was the last name of your childhood doctor?

.....

What was your most memorable gift as a child?

.....

Remember this device to avoid answering these questions upon login.

Do not check if you are accessing this website from a public device

[Continue](#)

[Cancel](#)

1. On the **NetXInvestor** home page, click the **Settings** icon. The **Settings** page displays.
2. In the **Security Settings** section, click the **Edit** link in the **Security Questions & Answers** row.
3. In the **Enter Password** field, type your current password and click **Continue**. The **Change Security Questions and Answers** page displays.
4. To mask your answers with asterisks, select the **Mask Response to Secret Questions** check box.
5. From the questions list, select a question and type your answer in the text field provided below.
6. To avoid answering the questions during sign in, select the **Remember this device to avoid answering these questions upon login** check box.
7. Click **Continue**. The **Change Security Picture and Phrase** page displays.
8. To change the security picture, click the **Select a different image** link and select the desired image.

9. To change the security phrase, type the required text and click **Continue**. A message displays stating the security picture and phrase was successfully changed.

10. Click **Close**.

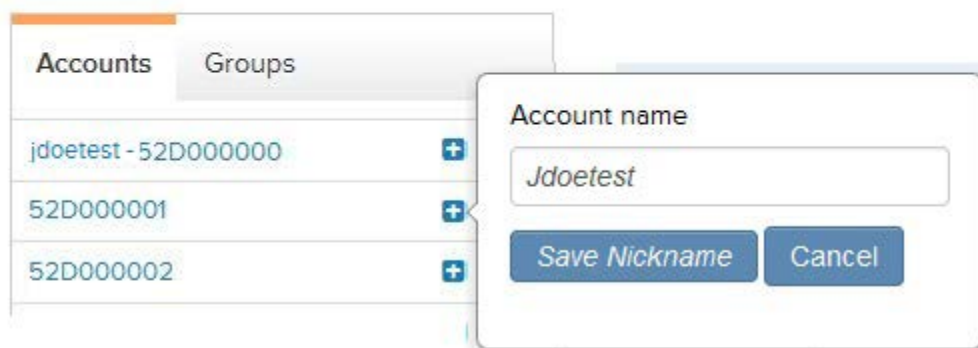
Account Nickname

A nickname enables you to quickly identify your accounts. The nickname is displayed to the left of the account number.

Accounts & Groups

Primary Account

52D000000



1. On the **NetInvestor** home page, click the **Settings** icon. The **Settings** page displays.
2. In the **Accounts** area, click the (+) icon against the required account.
3. In the space provided, type a nickname for the account and click the **Save Nickname** button.

Account Groups

An account group is a collection of accounts.. The investment portfolio of an account group can be accessed from a single place. You can create, modify, or delete a group.

- Account group names can have up to 25 characters and contain alphanumeric characters, spaces, hyphens, and apostrophes.
- Account groups must contain a minimum of two accounts.
- Duplicate account groups cannot be created.
- Accounts can exist in more than one account group.

Create a New Group

1. On the **NetInvestor** home page, click the **Settings** icon. The **Settings** page displays.
2. In the **Accounts & Groups** section, click the **Groups** link.

3. Click the **Add New Group** link. The **Add New Group** window displays.
4. In the **Group Name** field, type a name for the group.
5. In the **All Account** list, select the required account and click the **Add** link. To remove an account, select the required account in the right box and click the **Remove** link.

Tip: You can select multiple and continuous accounts by pressing **Shift** in the keyboard and selecting the accounts. You can select multiple and random accounts by pressing **Ctrl** in the keyboard and selecting the accounts.

Electronic Delivery

You can enable electronic delivery of statements and documents to be delivered to your e-mail address (es). You can also view the statements and documents online via the NetXInvestor platform.

You can setup the e-delivery preferences for an individual account or for all accounts using the **Quick Enroll** option.

The retention time for account communications and documents vary based on the communication type. To view the retention time, click the **View Retention Times** link.

The **e-delivery Preferences** section is available in the **Settings** page. You can access this section by one of the following ways:

- On the **NetXInvestor** home page, click the **Go paperless** icon.
- On the **NetXInvestor** home page, click **Communications > Settings**.
- On the **NetXInvestor** home page, click the **Settings** icon.

Add E-mail Addresses

The **e-Delivery Preferences** section displays all the e-mail address (es) you have added earlier to your account. If you have not added any e-mail address (es) earlier, follow the instructions below to add.

Add Email Address X

EMAIL ADDRESS 1:

CONFIRM EMAIL ADDRESS 1:

EMAIL ADDRESS 2:

CONFIRM EMAIL ADDRESS 2:

1. On the **NetXInvestor** home page, click the **Settings** icon. The **Settings** page displays.
2. In the **Email Address(es)** section, click the **Add Email Address(es)** link. The **Add New Email Address** window displays.
3. In the **Email Address 1** and **Confirm Email Address 1** fields, type the primary e-mail address.
4. In the **Email Address 2** and **Confirm Email Address 2** fields, type the secondary e-mail address.
5. Click the **Save** button.