# NETXINVESTOR™

Client Online Self-Registration

*www.NetXInvestor.com*

Online self-registration is limited to the account types listed below.  Please contact your advisor/representative for registration of all other account types.

- **Individual** accounts,
- **Joint** accounts (where you are the **primary** account holder), and
- **Retirement** accounts

1. Go to: www.netxinvestor.com
2. Click **Register Now.**
3. Review the **Welcome Screen** and click **Next.**
4. Review the terms and conditions regarding identity verification and click **I Agree**.
5. Provide user information, including your name, a valid email address, Social Security number, legal U.S. address, and account number on which you are listed as the primary account holder. *You will be able to link additional accounts under your social security number once logged in under the Settings icon.*
6. Verify your identity and proceed.

    To verify your identity and for the safety and security of your information, you will be asked three questions.

    - If you provide the correct answer to all three questions, you will be taken to the next step.
    - If you fail to provide the correct answer for one question, the fourth question will be displayed. If your answer to the fourth question is correct, you will be taken to the next step.
    - If you fail to provide the correct answer for more than two questions, a message displays indicating you have failed to verify your identity. You can either try again later or contact your advisor/representative for assistance.

7. Create a **temporary user ID** and **password.**
8. Enter **email address**, **date of birth** and **mother's maiden name**.
9. An email with further instructions is sent to the entered email address. Action should be taken in three days of receiving the email.
10. Click the link in the email within three days to make the **user ID** permanent.
11. Create personalized security questions when prompted.
12. Select a picture and phrase when prompted.
13. The self-registration for online access is completed.
14. If you desire **e-delivery**, click the **Go Paperless** icon and follow the instructions to add email address and create paperless preferences. We highly encourage you to sign-up for e-delivery in order to avoid the paper surcharge when documents are mailed to you.

v. 4.7.16