

NetxInvestor Client QuickStart



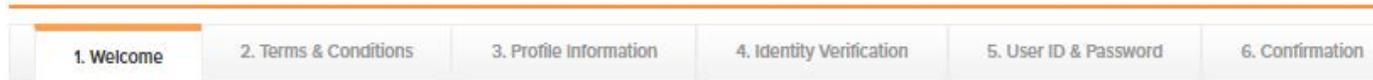
NetXInvestor™ is an online investor platform enabling you to access account details, preform market research, and view important account statements and confirmations.

Self-Registration

Get started by logging on to <https://www.netxinvestor.com/> and clicking **Register** from the right-hand column of the page.

Need an ID?
NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week.
Sign up today to access your account online.

[Register](#) [Check Status](#)



Welcome – Enter the first three characters of your account number and click **Start Registration**.



Terms and Conditions - Review the terms and conditions and check the box next to **I Agree**. Then, click **Continue**.

Profile Information - Enter your profile information. Note that **all fields are required**. You will need

- First and Last Name
- Your Social Security Number
- Your primary account number
- Your address

Identity Verification – You will be presented with **three Knowledge Based Questions** to verify your identity. Each one must be entered correctly to continue. If one question is answered incorrectly, you will be prompted to answer a fourth question.

User ID and Password - Choose a **user ID**, between 7 and 15 characters, and a **password**. You must also enter a valid email address and your mother's maiden name to be used for future need to reset your password.

Password Criteria

1. not contain your user ID
2. minimum of 8 and a maximum of 32 Characters
3. must contain uppercase and lowercase characters
4. must contain a numeric character
5. not contain your first, last, or middle name.

Confirmation - An automated e-mail will be sent to the e-mail address you provide within 15 minutes of creating the User ID. **Click the link in the e-mail to complete the registration process within 3 days.**

Note: After 3 days, the email link will expire and you will need to restart the registration process.

Login – Upon your first login, you will be prompted to change your password, set up security questions and answers, a security image and a security phrase.

Login

5HQ [Look Up](#)

[Enter User ID](#) [Forgot User ID?](#)

[Enter Password](#) [Forgot Password?](#)

Remember User ID [Continue](#)

Your Financial Organization Number is 5HQ

For assistance with your NetXInvestor account, please contact your financial advisor.

Enroll in e-Delivery

Login to your NetXInvestor account and select **Go Paperless** in the upper right-hand corner of the page. Select **Quick Enroll** and update your account preferences. If you choose to receive proxy and shareholder communications electronically, you will be asked to enter a four-digit numerical PIN.