

# NETXInvestor Startup Guide

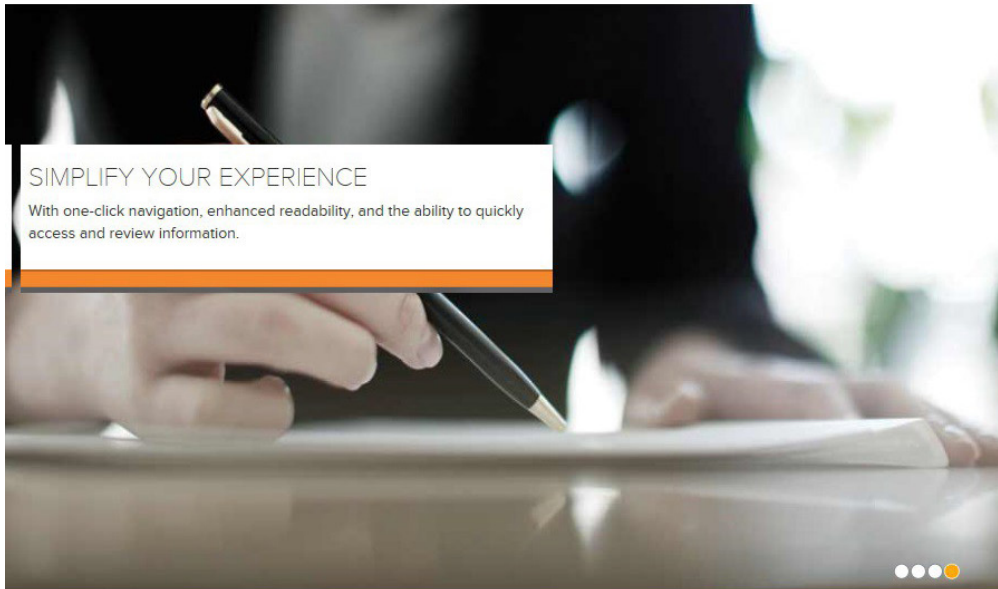


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## I. Log In

To log in, go to [www.netxinvestor.com](http://www.netxinvestor.com)



### SIMPLIFY YOUR EXPERIENCE

With one-click navigation, enhanced readability, and the ability to quickly access and review information.

**Login**

Look up

User ID

Remember me

**Quick Quote**

Enter Symbol or Name

**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.

Enter the financial organization number **5CR** in the Login box and enter your User ID in the User ID box, click **Continue**.

Enter your password and click **Continue**.

**Password Authentication**

User ID: ODATTEST

Enter Password

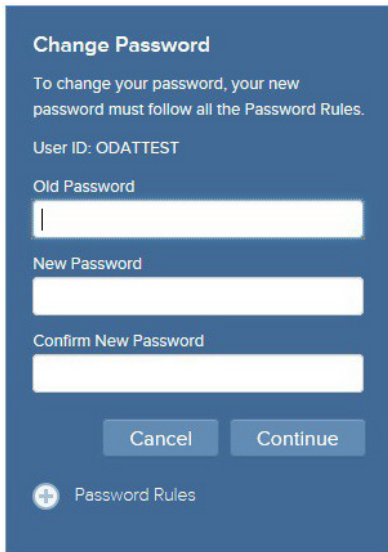
**Need an ID?**

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.

## A. Create or Change Your Password

You will be required to create your own password. Enter your original password in the Old Password field and then enter your New Password. Enter your New Password again in the Confirm New Password field and click **Continue**. If you need to view the password criteria, click the plus sign next to Password Rules.

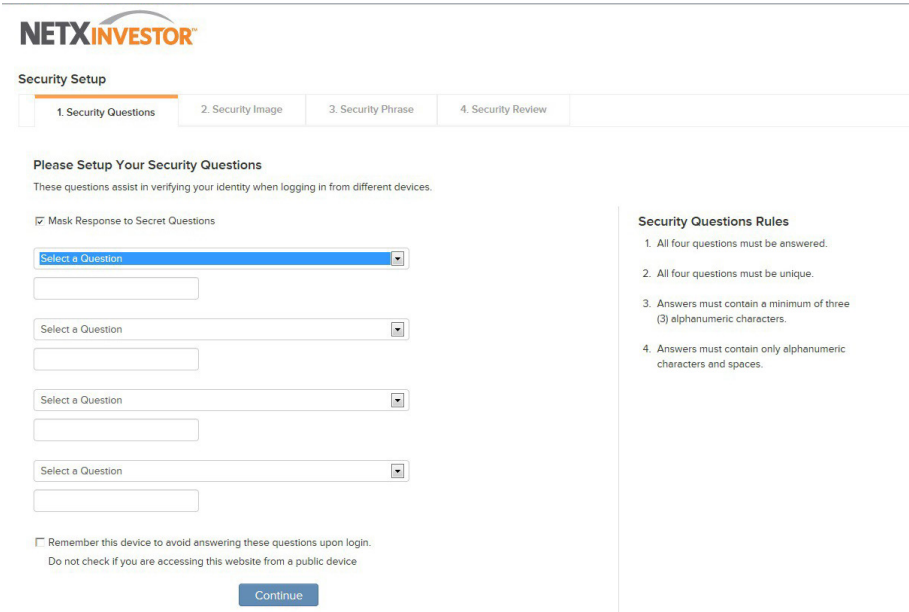


The screenshot shows a blue-themed 'Change Password' form. At the top, it says 'Change Password' and 'To change your password, your new password must follow all the Password Rules.' Below this, the 'User ID' is listed as 'ODATTEST'. There are three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom, there are 'Cancel' and 'Continue' buttons, and a link with a plus sign icon labeled 'Password Rules'.

## II. How to Setup Your Account

### A. Setup Your Security Questions

After you create your password, you will need to setup your Security Questions. If you want to see what you are typing in for your answers, uncheck the box next to **Mask Response to Secret Questions**. If you do not want to be prompted with a security question each time you log in, you can check the box next to the **Remember this device to avoid answering these questions upon login**.



The screenshot shows the 'Security Setup' page for NETXINVESTOR. It has a progress bar with four steps: '1. Security Questions', '2. Security Image', '3. Security Phrase', and '4. Security Review'. The first step is active. The main heading is 'Please Setup Your Security Questions' with a sub-note: 'These questions assist in verifying your identity when logging in from different devices.' There is a checkbox for 'Mask Response to Secret Questions' which is checked. Below this are four question selection fields, each with a dropdown menu labeled 'Select a Question' and an empty text input field. At the bottom, there is a checkbox for 'Remember this device to avoid answering these questions upon login.' with a sub-note: 'Do not check if you are accessing this website from a public device'. A 'Continue' button is at the bottom right. On the right side, there is a 'Security Questions Rules' section with four numbered rules: 1. All four questions must be answered. 2. All four questions must be unique. 3. Answers must contain a minimum of three (3) alphanumeric characters. 4. Answers must contain only alphanumeric characters and spaces.

After you have selected four questions in the dropdowns and you have entered answers to your selected questions, click **Continue**.

## B. Setup Your Security Image

After you setup your security questions, you will need to select a security image. Click **Select** in blue font beneath the picture to view the available images. Click on the image you would like to select as your security image.



### Security Setup

1. Security Questions	2. Security Image	3. Security Phrase	4. Security Review
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#### Please Set Up Your Security Login Information

Your security login information consists of a phrase and image. This security feature will be used to identify the legitimate NetExchange website. When logging in, do not enter your password if you do not see your personalized phrase and picture. This security feature prevents imposter websites from phishing for your personal information.

Step 2.

Select an image from our image library.



Select

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## C. Setup Your Security Phrase

Next, you will need to create a security phrase. Once you have entered your phrase in the text box under your security image, click **Continue**.



### Security Setup

1. Security Questions	2. Security Image	3. Security Phrase	4. Security Review
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#### Please Set Up Your Security Phrase

Please confirm your image and enter a personalized security phrase in the text box (max 50 characters).

Step 2.

Security Image



Change Image

Step 3.

Enter your personalized security phrase.

(max 50 characters)

Note: Do not use login related terminology (i.e. login ID, password, answers to security information, etc.)

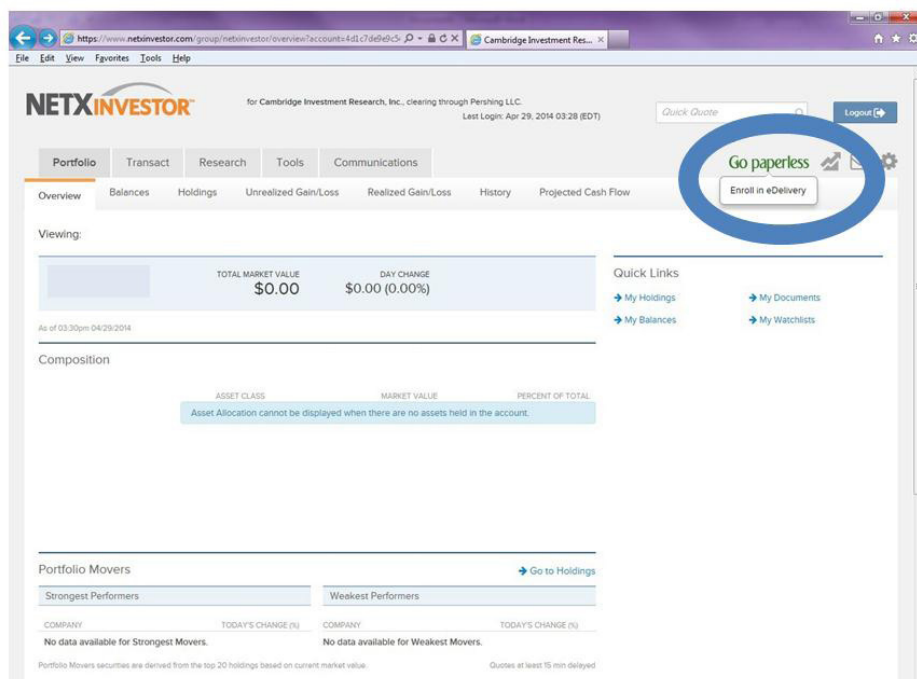
Continue

**Security Review** is a review of all the information you have entered. If your security information is correct, click **Continue**. This will conclude the setup process and take you into your account information.

### III. How to Enroll in eDelivery

#### A. Setup Go Paperless Options

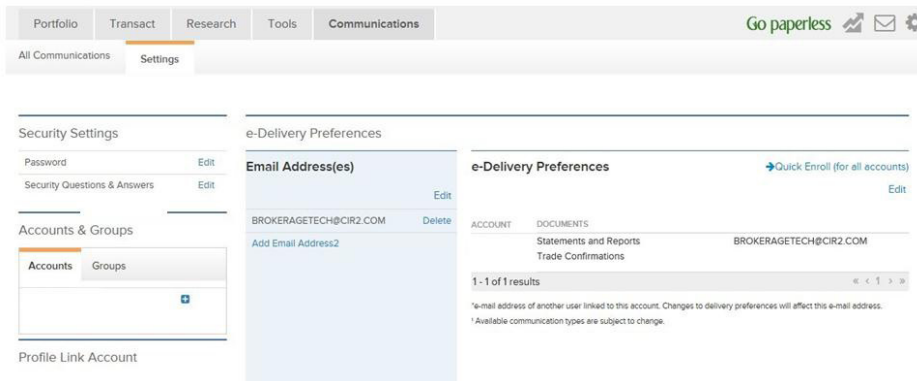
To set up eDelivery, click on the green text **Go paperless**, in the upper right hand corner of your screen.



After clicking on the **Go paperless** option, you will need to update your Email Address(es).

#### B. Setup Email Address(es) for eDelivery

To change or add an email address for eDelivery, click **Edit** in the email address(es) box in the center of your screen (blue background).



Enter and confirm your email address(es). Click **Save**.

**Edit Email Address**

EMAIL ADDRESS 1:  CONFIRM EMAIL ADDRESS 1:

EMAIL ADDRESS 2:  CONFIRM EMAIL ADDRESS 2:

**Save** **Cancel**

### C. Setup Document Delivery Preferences

To change the documents that are sent via eDelivery and/or via paper mailings, click **Edit** under **Document Delivery Preferences**. Click on the boxes next to the account communication type for electronic delivery. An email notification will be sent when a new communication is available to view online. Click **Save** and accept the Electronic Notification Agreement. **Please note: Available communication types are subject to change.**

**Document Delivery Preferences**

ACCOUNT: [REDACTED] DOCUMENTS: BROKERAGETECH@CIR2.COM\*

- Statements and Reports
- Trade Confirmations
- Notifications (Documents Included)
- Tax Documents (Documents Included)
- Prospectus (Documents Included)
- Proxy/Shareholder Communications

BROKERAGETECH@CIR2.COM

**Save** **Cancel**

REMINDER: By checking the box next to the account communication type, you are choosing electronic delivery. An e-mail notification will be sent when a new communication is available to view online.  
When you select **Save**, you will be asked to accept the [Electronic Notification Agreement](#). You may change your delivery preferences at any time by returning to this page and unchecking the box next to the communication type.  
\*e-mail address of another user linked to this account. Changes to delivery preferences will affect this e-mail address.  
\*Available communication types are subject to change.

If you have questions, contact the Cambridge Operations Development and Technology Team ([brokeragetech@cir2.com](mailto:brokeragetech@cir2.com)) at 800-777-6080.



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