

NETXINVESTOR REGISTRATION GUIDE

Below are the instructions an investor with brokerage accounts held with Pershing should follow to register and setup online access, as well as set up electronic delivery preferences.

Eligible registration types:

- Individual
- Joint
- Traditional IRA
- Roth IRA
- Rollover IRA

Ineligible registration types include, but are not limited to:

- Individual Transfer on Death
- Joint Transfer on Death
- Trust
- Simple IRA
- Corporation

For a full list of ineligible registration types or assistance with registering, please call Cambridge Investment Research, Inc. at 888-245-0452.

1. Visit www.netxinvestor.com and select Register Now



2. Enter the first three characters of the account number and select Start Registration

1. Walcome	2. Terms & Conditions	3. Profile Information	4. Identity Verification	5. User ID & Password	6. Confirmation	
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he regarded proce	as we allow you to create a new use	P ID and password with which I	to access your investment inform	witch of the sile.		
kase contact your f	nancial organization if you have an e	orieting user ID and wish to link	addional accounts.			
bu will be guilded the	ough 4 simple steps to complete you	r registration, during which you	will be asked to			
1. Review and agree	to the Terms and Conditions repart	ing the use of this websile				
2. Provide user info	mation, including an e-mail address					
4. Create a user ID	and secure permoted					
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3. Read through Terms & Conditions. Check I agree and select **Continue.**



4. Complete all fields under User Information and select Continue.

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1. Vieture 2. Terre & Conditions	3. Profile Information	4. Meetily Vertication	5. User 1D & Password	6. Confermation
momation				
Provide the following information, which will be 1907 impact your could railing	used to authenticate your denti-	ly. This service is provided by a	Bed-party vendor Authentical	ing your identify in this
Please do not clob the "Back" bullon in your brown	er during the regulation process			
Final Name	Last Name			
•				
Address Line 1	Address Line 7 (out)			
Provide your full logal address				
2ip Code	City			
Detr.				
	•			
Social Security Harriser	Cute of Brits			
A Vite my participantic participanti	198 managements			
Phone Number	Account Number			
	Please other an acc primary account hole	ouril number where you are a der or participant.		

5. Complete the required Identity Verification questions and select **Continue**.

line Registration	on				
1. Welsome	2. Terms & Conditions	3. Profile Information	4. Identity Verification	5. User ID & Password	6. Confirmation
Identity Verifica	tion				
Please answer the f	following required questions to ve	nify your identity.			
During which of t	he following years did you live	in Moninoville?			
0 2006					
0 2006					
0 2014					
2016					
O 2022					
Office of the abo	rve or I have never been associa	led with this city			
Cancel					Continue
intervation is provided	13y NatKinvestor through Penahing LLI	C. namber FINIA, NYSE, SPC, a	subsidiary Asse	Protection 782a Paraling Project M	egin Dedosure i Coskis Poley i Meraga i
to Some of New York Int	whose Corporation.			A 1971 Readers 11	All Rights Reserved. Click have by lawn

6. Create a User ID and Password by completing the required fields. Select **Continue**. Note: refer to Password Rules when creating a password.

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1. Welsome 2. Terms & Canditions	3. Profile Information	4. Identity Verification	5. User ID & Password	6. Confirmation
User ID & Password			Tişt Passwords can c 초*출:S+1-5 #7	ontain the following special characters: _1
Passward	Confirm Password		To-create an acceptor	ole password your pasword must.
= 14			•	
Email Address	Confirm Email Address	9	1 natication same 2 contain a minima	as the user ld in of 8 and a maximum of 50 characters
			3. contain at least of 4. matcontain linked	ne siphs and one numeric character
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7. The following confirmation screen will appear once completed. A confirmation email will be sent to the email address provided.

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1 Values	2. Terro & Conditions	3 Profix Information	4. Identity Verification	5 User ID & Parented	6. Confirmation	
Anation						
Your user ID has I	een oralled successfully					
Uper ID: Financial Org #	cambridge20	23				
Email Address	techaccess@	cir2.com				
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8. Open the confirmation email and select **Click Here** to be redirected to the NetXInvestor webpage to finish the registration process.



9. Select Login > enter the Financial Organization # 5CR > enter User ID and Password > select Login



10. Enter and re-enter an email address to receive security alert notifications, then select Save.

	0
Stronger Authentication	
For your security, we require you to select an email address where we can send you socially and NOTE 'You must set up an email address Send security alert notifications to the tolowing address.	notifications.
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Contra Inderes	
Cancer Cancer Cancer medies is growthat by het/downlay through heaping LLC, menter (TBAS, MYR, SPC, a substate) of	

11. A confirmation email, like the below, will be received to confirm this update.



12. Select **Contact Method** to setup a One-Time Passcode. This will be used as a 2-Factor Authentication for NetXInvestor login.

NETXINVESTOR	
One-Time Passcode Setup	0
The one-line paracode is a lemporary code we wind to your selected device to confirm your identity	Tel su rom
NOTE You must set up and verify at wast one contact muthod.	
CONTACT MARTINE 0	
Seed Collad Method-	
Tant 1929 in 1929) in 1942 in cancel i Tant HEUF in 1939) in 1942) for help or call your Representation (1	knope & date take may apply 1965 Term & Candition
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13. Choose from SMS/Text, Email, or Voice Call to receive a One-Time Passcode. Complete all fields and select **Verify**. Note: Device Nickname is a required field.

SMS/Text:

One-Time Pa	sscode Setu	ID				
ene miera	boot out	*P				
The one-time passcode is	a temporary code we se	end to your selected devic	e to confirm your identity. Tet me m	one		
NOTE: You must set up an	id verify at least one con	stact method.				
Contact Mothod 0	Phone Number 0	•	Device Nickname 0			
SM5/Text	• 📓 +1 Unit •	Enter Phone Num	Enter Nickname	Verty	Dente	
	The second Part of the	o 75780 or 59422 for help or	call your Representative Message & o	data rates may apply: SMS Ter	ms & Conditions	
Text STOP to 75780 or 594	22 to cancel i lest PELP II.					
Text STOP to 75780 or 594	22 to cancer i lest PELP's					
Text STOP to 75780 or 594	22 to cancer Lest PED* 8					

Email:

One-Time Pas	sscode Setup			
The one-time passcode is	a temporary code we send to you	ur selected device to confirm your identi	y. Tell me mote	
NOTE: You must set up and	s verify at least one contact meth	00.		
Email •	Email Address	Device Neckhame	Verity Denete	
Text STOP to 75780 or 5942	2 to cancel I Text HELP to 75780 or	59422 for help or call your Representative	Message & data rates may apply: SMS Terms & Cond	Bons
Test \$70P to 75780 or \$942	2 to cancel Test HELP to 75780 or	59422 for help or call your Representative	Message & data rates may apply: SMS Terms & Cond	tons
Text STOP to 75780 or 5942	2 to cancel I Test HELP to 75780 or needlar through Penning LLC, member	59422 for help or call your Representative re FINIA, NYSE, SIPC, a subsidiary of	Message & data rates may apply: SMS Terms & Cond Asset Protection FAGs Penaling Privacy	Bons Margin Disclosure I Cookie Policy i Manage C

Voice Call:

One-Time Pas	scode Setup			
The one-lime paracode is a	iverparary code we weld to your weikcled de	whom to comfirm your identify. Teel the more	6	
NOTE You must set up and o	writy at least one contact method.			
Contact Mathee	Phone Number 0	Device Nickname 0		
V009 *	E +EURL + Drive Prone Nove	Ditter NOUVON	Vority Oxfords	

14. Enter the One-Time Passcode and select Verify.

Pt	OTP Verification	× 15.
1	We sent you a One Time Passcode (OTP) to verify the phone number you provided.	NOTE: You should receive a code within
	The code was sent to +1712	seconds. The code expires in 30 minutes.
B	Enter One Time Passcode.	If you replied STOP to any of your previous messages, you will not receive the code. For help, Call your help Desk.
	VERIFY CANCEL	Didn't Receive a Code? Please make sure:
l		The code is being sent to the correct phone number.
		Your mobile provider or SPAM filters do not block third party messaging.
l		If you are unsure, contact your provider.
		Select New Code

15. Optionally, check **Remember My Device** and select **Save**. Checking Remember My Device will eliminate the requirement to get a One-Time Passcode upon login for 120 days on that specific device.

One-Time P	Passcode Setup			
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Contact Method	Phone-Number	Device Nickname		
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16. If Remember My Device is selected, an email like below will be sent:



17. The following message indicates the information provided will be used in the future to access accounts online. Select **Ok**.



18. If there are additional eligible accounts open at the time of registration, the following screen will display to link these accounts. Check applicable boxes and select **Submit**.

Accour	nt Linking				
We have	detected that you have access to the folic	weng accounts. You can link any or all of these accounts to this up	ser #3.		
	ACCOUNT	MALING ADDRESS			
		SAMANDIA.			
	148	FAIRFIELD IA 52556-3858			
		SAMANTUA			
	1-8				
		FABLE BLU M SUDDE JEDE			
			Submit		
This information is provided by Cambridge Investment Research, Inc. through Purshing LLC, member FINDA,			Asset Protection F4Qs (Penshing Privacy Margin Disclosure Cookie Policy		
NT54, 544	c, a subradiary of the literal of Now York Molices C	orporation.	© 2023 Penhing LLC. All Rights Reserved. Click here for terms of use. Trademarkes belong to their respective owners.		

19. To link new account(s) opened after registering select **Communications** > Settings.



20. In the lower left-hand corner under **Account Linking** check applicable boxes and select **Submit** to gain access to the account(s).



21. After going through any additional security measures, the following screen will enable **Electronic Delivery.** Complete the required fields and select **Accept**.



22. If the previous screen is missed or Remind Me Later was selected, electronic delivery can be setup by selecting **Go Paperless** in the upper right-hand corner of the screen.

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Operations

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