

A Window to Your Financial World







NetXInvestor[®] provides you with online access to your investment accounts, night and day, seven days-a-week.¹ In addition, you can have instant access to balances, portfolio holdings, account activity, order status information and more.

View your investment account statements, tax statements and trade confirmations online. You also can access quotes, read news stories and perform research using advanced screeners on thousands of stocks, mutual funds, 529 plans and exchange-traded funds (ETFs)—all online, at your convenience. Unlimited access and a user-friendly interface will help you manage your investments.

Organize Your Accounts.

Sign up for SelectLink[®] to combine statements for accounts that share the same address, and receive an easy-to-read summary page.

¹ System availability is contingent on volume, Internet bandwidth, market volatility and other factors that could interrupt system access.

Your Critical Account Information at Your Fingertips

NetXInvestor enables you to view comprehensive account details. As you click through, you can obtain information including account balances, holdings, history, projected cash flow, asset allocation, statements and reports, BillSuite[™], mutual fund comissions, and profile information.

The intuitive interface makes it easy to find the information you need. You can also easily create and manage groups of accounts that are associated with your user IDs to view combined account balances and asset allocation.

Comprehensive Summary on the Home Screen

Access a high level overview of your portfolio—clearly displaying market valuation of your accounts, a pie chart explaining your portfolio's asset allocation and portfolio value changes by dollars and percentages. With one click of a button the dynamic links on this page enable you to view your detailed holdings or account balances.

	INVESTO					6		-* -
	Portfolio	Research	Tools	Communications		Go	o paperless 🛛 🔏	
Overview	Balances	Holdings	Unrealized Gain/Loss	Realized Gain/Loss	History Projected	Cash		
Summar	у					Quick Links Edit	it	
Viewing	Joint Account		\$			→ My Holdings	→ My Document	its
viewing	Joint Account		Ŧ			→ My Balances	→ My Watchlist	
TOTAL MARK	ET VALUE	DAY CHANG	E				→ Markets Toda	ay
TOTAL MARK			e .87 (4.30%)				→ Markets Toda	ау
\$2,800,	741.12						→ Markets Toda	ау
\$2,800,	741.12						→ Markets Toda	ау
\$2,800, As of 10:30am	741.12 05/07/2013						→ Markets Toda	ay
\$2,800, As of 10:30am	741.12 05/07/2013		.87 (4.30%)	MARKET VALUE	PERCENT OF TOTAL		→ Markets Toda	ау
\$2,800, As of 10:30am	741.12 05/07/2013	\$120,431	.87 (4.30%)	MARKET VALUE \$1,820,481.73	PERCENT OF TOTAL 65.00%		→ Markets Toda	ау
	741.12 05/07/2013	\$120,431	.87 (4.30%) .s				→ Markets Toda	ау
\$2,800, As of 10:30am	741.12 05/07/2013	\$120,431	.87 (4.30%) .s	\$1,820,481.73	65.00%		→ Markets Toda	ay

All Your Holdings, Intelligently Organized

See a detailed summary of your holdings and quickly find your holdings by symbol or asset type. Detailed information on a security is only a few clicks away through the "Actions" drop-down selection. You can also easily access detailed information on your realized and unrealized gains and losses.²

	INVESTO	JK							Quick Quote		Q Logout
	Portfolio	Research		Tools	Commu	nications				Go paperless	2 🕈
Overview	Balances	Holdings	Unrea	alized Gain/Los	s Realized	Gain/Loss	History	Projected Cas	h		
Viewing	Joint Account		;	•							
				SYMBOL / CUSIP ,	A.)	ACCOUNT					CHANGE 🛋
Summa	ry of Holdin	gs		DESCRIPTION ▼		ACCOUNT		QTY 🛋	LAST PRICE (\$) 🛋	MARKET VALUE (\$) A	5 DAY CHART
			(AAON Inc New		Nickname Short	- 123456789	10.00	32.50 10:30am 09/10/13	69,172,659.76	+2.23%
			•	000932445 ABN AMRO HLI	DG N V C/A EFF	Nickname Margin	- 123456789	100.00	30.45 10:30am 09/10/13	7,598,486.59	+1.30%
			•	ACM	IOLOG CORP D	Nickname Multiple	- 123456789	152.00	44.50	2,352,119.36	+0.10%
			(007935211 ADVANCED VIE	RAL RESH COR	Nickname Cash	- 123456789	1,548.00	12.75	1,336,504.15	+1.10%
	total value 20,481.73 (6	65.0%)	0	AKAM		Nickname Multiple	- 123456789	651.00	62.35	2,536,928.05	+2.25%
-	L FUNDS TOTAL VAL										
),111.17 (15.			ANSACTION H					ASSET CLASS	TOTAL UNREALIZED GA	IN/LOSS TERM
■ 	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	.0 /0)	1 M	D I 3 MO I 6 M	DI 1YR I 3YR I	5 YR			Common	\$5,327.50	Both
	0,088.93 (12						100	\$63.00	Stock		
4330	9,000.93 (12	70)			N	A	- May	62.50	ACCOUNT TY	PF	
CASH, N	MONEY FUNDS, BANK	DEPOSITS	2			/ v v	1	V 62.00	TYPE	QUANTITY	MARKET VALUE (\$)
\$224	1,059.29 (8%	5)		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Dww	·		61.50	CASH	640.00	2,500,900.05
	CURRENT ACCOUNT	VALUE		~				61.00	MARGIN	11.00	36,028.00
	00,741.12		20	011	201	2	20	013			
Mutual fund pr	layed per exchange ag rices as of previous bus	iness close.	0	BUY	ату 152.00	PRICE \$62.79	VALUE 11/20/2 \$18,240	()		Unre	alized Gain/Loss
Download	d		0	AVPAX		Nickname	- 123456789	452.00	113.45	298,398,289.99	-4.45%
			(+)	AMERICAN BEA	ACON SMALL				10:30am 09/10/13		m
			Ð	BANK AMER CO	ORP COM	Nickname Cash	- 123456789	200.00	165.24 10:30am 09/10/13	298,597,230.00	+2.25%
						CdSII					
			•	BANK OF NEW			- 123456789	850.00	75.12 10:30am 09/10/13	298,497,198.76	-0.25%
			⊕		YORK MELLO	Nickname Margin	- 123456789 - 123456789	850.00		298,497,198.76 69,172,659.76	
			-	BANK OF NEW	YORK MELLO YOND INC C	Nickname Margin Nickname Cash			10:30am 09/10/13 98.32		+1.30%
			•	BANK OF NEW BBY BED BATH & BE	YORK MELLO YOND INC C	Nickname Margin Nickname Cash Nickname Multiple	- 123456789	500.00	10:30am 09/10/13 98.32 10:30am 09/10/13 27.68	69,172,659.76	+1.30%
			 	BANK OF NEW BBY BED BATH & BE BEST BUY INC (YORK MELLO YOND INC C COM R INC COM	Nickname Margin Nickname Cash Nickname Multiple Nickname Margin	- 123456789 - 123456789	500.00	10:30am 09/10/13 98:32 10:30am 09/10/13 27:68 10:30am 09/10/13 45:27	69,172,659.76 7,598,486.59	+1.30% +0.10% +1.10%
			 	BANK OF NEW BBD BATH & BE BBD BATH & BE BBST BUY INC (BA BIOMED RLTY T BSX	YORK MELLO YOND INC C COM R INC COM	Nickname Margin Nickname Cash Nickname Multiple Nickname Margin	- 123456789 - 123456789 - 123456789	500.00 100.00 789.00	10:30am 09/10/13 98.32 10:30am 09/10/13 27.68 10:30am 09/10/13 45.27 10:30am 09/10/13 600.00	69,172,659,76 7,598,486,59 2,352,119,36	+1.30% +0.10% +1.10% +1.10% +2.25%
			 	BANK OF NEW BBD BATH & BE BD BATH & BE BBA BEST BUY INC BA BIOMED RLTY T BSX BOEING CO CC CASH CASH CIBFX	YORK MELLO YOND INC C COM R INC COM	Nickname Margin Nickname Cash Nickname Multiple Nickname Margin Nickname	- 123456789 - 123456789 - 123456789 - 123456789	500.00 100.00 789.00 600.00	10:30am 09/10/13 98:32 10:30am 09/10/13 27:68 10:30am 09/10/13 45:27 10:30am 09/10/13 600.00 10:30am 09/10/13	69,172,659,76 7,598,486,59 2,352,119,36 1,336,504,15	+1.30% +0.10% +0.10%

² Realized and unrealized gain and loss calculation is an optional feature that may not be offered by your broker-dealer.

Account History

It's easy to keep track of your accounts' history. Review up to two years of transaction history for your accounts, filtered and categorized the way it makes sense to you. You can search by transaction type and symbol, and specify a time period or a date range to narrow your search.

Portfolio Research	Tools	Communica	ations			Go paperless	2 🖸	* 1
Overview Balances Holdings	Unrealized Gain/Los	s Realized Ga	ain/Loss Hi	story Proje	ected Cash			
Viewing Joint Account	\$							
Filter by:	DATE 🔻 AC	COUNT 🔺	ACCOUNT TYPE	SYMBOL/CUSIP A	DESCRIPTION A		NET AMOU	JNT 🔺
Symbol, name, CUSIP Q	(+) 09/13/2013 Nic	kname - 123456789	Short	AAON	Mark To Market		-\$123	34.56
TIME PERIOD	(+) 09/13/2013 Nic	:kname - 123456789	Margin	000932445	Mark To Market		-\$12:	34.56
Year To Date \$	(+) 09/12/2013 Nic	:kname - 123456789	Short	ACM	Dividend/Interest Recla	ssification		\$.56
From date to To date	09/12/2013 Nice	kname - 123456789	Short	007935211	Cash Dividend Received	1	-\$123	34.56
TRANSACTION	(+) 09/11/2013 Nice	:kname - 123456789	Margin	AKAM	Buy 1.0000 Shares of IE	IM @ 11.00000	-\$123	34.56
All	O9/11/2013 Nid	:kname - 123456789	Cash	FAMVX	Dividends - Reinvest Sh	ort Term Cap Gain - Rein	FAMVX	32.93
TRANSACTION								
All Account Types +	From Margin	Account to Sh	ort Account					
Apply Filters	09/11/2013 Nice	kname - 123456789	Cash	МММ	Dividend/Interest Recla	ssification	-\$1	27.00
Download	09/09/2013 Nice	:kname - 123456789	Cash	MSFT	Cash Dividend Received	3	\$1	27.00
	09/08/2013 Nice	:kname - 123456789	Cash	USD999997	Mark To Market		\$	25.77
	09/07/2013 Nic	kname - 123456789	Cash	HP	Buy 20.0000 Shares of	HP @ 100.00000	\$2,00	00.00
	TRADE DATE 09/07/2013 SETTLEMENT DATE 09/10/2013	ACCOUNT TYPE Cash	QUANTITY 20	LAST PRICE \$100.00	PRINCIPAL -\$2,000.00	COMMISSION / FEES	NET AMOUNT \$2,000.	.00
	09/07/2013 Nice	kname - 123456789	Cash	NDSN	Dividend/Interest Recla	ssification	\$1:	26.43
	(+) 09/05/2013 Nic	:kname - 123456789	Cash	EMR	Cash Dividend Received	ł	\$1.30	00.42

Statements and Reports

View up to 10 years of account statements, seven years of tax statements, and three years of trade confirmations. Enroll for paperless statements and trade confirmations by clicking the "Go Paperless" link. You can also view and manage communications from your advisor via the notifications tab.

> BillSuite[™]. You can view, pay and manage your bills online. Bill Suite is available with Corestone[™], Pershing's asset management account.³

Portfolio	Research	Tools	Communications		Go paperless	<i>*</i>	\square	Q
All Communications Se	ettings							
Viewing Abcdefghijklmnop	qrstuvwxy (6	\$789) \$						
Messages		Statements			Combine	Documents		T
Messages	\bigcirc	Filter by:						
All Documents		Year To Date	\$	From date to To date	Apply Filters			
Statements	۲	DATE 🔻	TYPE 🔺	INSERTS A				
Confirms	\odot	09/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
Tax Documents	\bigcirc	08/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
Notifications	\bigcirc	07/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
Imaged Documents	\bigcirc	06/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
Help		05/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
Frequently Asked Quest	tions 🕑	03/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
		02/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
		01/12/2013	Monthly Statement	Insert 1, Insert 2, Insert 3				
		12/12/2012	Monthly Statement	Insert 1, Insert 2, Insert 3				

Award-Winning Statement

Every year since 2007, your statement has earned an "Excellent" designation by DALBAR INC. in the Trends and Best Practices in Investor Statements category.

³ Corestone is an optional feature. Contact your advisor for more information.

Electronic Delivery

More convenient, secure and flexible.



Convenience

Access account communications at any time, from any computer.⁴



Increased Security

Password-protected access to sensitive financial information reduces the risk of identity theft by eliminating paper delivery.

/

Centralized Record Keeping

Eliminate the clutter of extra paper; quickly search for the right account communication online.

Benefits Can Begin Today.

View account statements, trade confirmations, tax documents and more, online. The environment benefits, as well.

Accessible to Everyone

Critical account information should be accessible to everyone. When the optional "Accessible Theme" is selected, the navigation and appearance of NetXInvestor will follow the American with Disabilities Association (ADA) guidelines, including disclaimers, disclosures, help and footnotes. NetXInvestor is among the first in the industry to offer a fully WCAG 2.0 compliant site and certification of the site by an independent third party.



Insightful Research and Powerful Tools

NetXInvestor helps you make informed investment decisions by providing access to realtime and delayed quotes, late-breaking news stories and comprehensive information and research on thousands of stocks, options and mutual funds.⁵

Markets Today

NetXInvestor makes it easy to keep abreast of the latest market conditions on the Markets Today section—track market updates, market movers, access news headlines and more.

Get current information on major U.S. market indices, advances and decliners. Read through today's economic events and news stories by the latest date and top headlines before and after market closes. The Events Calendar allows you to follow a specific company and its scheduled events such as earnings announcements, dividends and splits, as well as events that affect the U.S. economy overall. Sector & Industry enables you to search news by topic, such as energy, healthcare and technology.

	NVEST	DR [®]						Quick Quote	Q	Logou	n (
	Portfolio	Research	Tool	s	Communications			Go paper	rless 📈	⊵*	1
Overview	Balances	Holdings	Unrealized Ga	ain/Loss	Realized Gain/Loss	History	Projected (Cash			
Markets T	oday									Furn Help <mark>ON</mark>	0
Enter name	or symbol	٩		AACS	SAAME AAMUQ AAO	N AIR AAXT	ANTQ				
U.S. Markets	s News	Events Calendar	Sectors & Inc	dustries							
	s News Events (37)		Sectors & Inv		et Update				Quotes at lea	st 15 min dela	ayed
	vents (37)	ال						Top Broad Market Indices	Quotes at lear		_
Today's E	Events (37) Earnings (2)	JI	une 21st, 2013	Marke	ew	ICE DAY C	CHANGE	Top Broad Market Indices	Fixed Income		ies
Today's E Economics (2) ECONOMIC EVEN	Events (37) Earnings (2)	Ji Dividends (33)	une 21st, 2013	Marke Overvi	ew				Fixed Income	Commodit	ies 2013
Today's E Economics (2) ECONOMIC EVEN	Events (37) Earnings (2)	Ji Dividends (33)	une 21st, 2013	Marke Overvi view	ew NAME PR	.36 🕹 -48.96 (·	0.33%)		Fixed Income	Commodit	2013
Today's E	Earnings (2) Market Focus Economic Even	Ji Dividends (33)	une 21st, 2013	Marke Overvi	ew NAME PR DJIA 14,709	.36 ↓ -48.96 (- 29 ↓ -9.90 (-	0.33%) 0.62%)		Fixed Income	Commodit RIDAY 06/21/2 \$14,9	2013 000
Today's E Economics (2) ECONOMIC EVEN	Earnings (2) Market Focus Economic Even	Ji Dividends (33) : :	une 21st, 2013	Marke Overvi view	ew PR NAME PR DJIA 14,709 S&P 500 1,578.	36 ↓ -48.96 (- 29 ↓ -9.90 (- 97 ↓ -37.67	0.33%) 0.62%) (-1.12%)		Fixed Income	Commodit FRIDAY 06/21/2 \$14.9 14.8 14.8	2013 000
Today's E Economics (2) ECONOMIC EVEN	Earnings (2) Earnings (2) Market Focus Economic Eve View More Ed	Ji Dividends (33) : :	une 21st, 2013	Marke Overvi	ew PR NAME PR DJIA 14,709 S&P 500 1,578. NASDAQ 3,326	.36 ↓ -48.96 (- 29 ↓ -9.90 (- 97 ↓ -37.67 .81 ↓ -52.16	0.33%) 0.62%) (-1.12%) (-0.58)		Fixed Income	Commodit FRIDAY 06/21/2 \$14,9 14,8 14,8	2013 000 50

⁵ Some market data features (including real-time quotes) are optional features that may not be offered by your broker-dealer.

Quotes & News

Get quotes for stocks, options, mutual funds or ETFs. Obtain the latest news headlines for each stock, as well as detailed information—including last bid, ask and volume numbers. You can also view charts for each security and modify the time series to track its price movement over time (up to 10 years). You will have access to consensus research ratings for equities, insider ownership, earnings, annual reports⁶ and SEC filings for the company you are researching. You can put your knowledge to work by creating watchlists of securities to track quotes and price performance. You should carefully consider the investment objectives, risks, charges and expenses of mutual funds and ETFs before investing, and also know that they may not be available in all jurisdictions. Please request from your financial organization the prospectus and, if available, the summary prospectus of each individual mutual fund or ETF and read carefully before investing. Information and content available on NetXInvestor is not intended as and does not constitute an offer, solicitation or recommendation to purchase or sell any security. Past performance is not indicative of and is not a guarantee of future performance.

	NVEST	DR [®]				Quick Quote	Q Lo	gout 🖪
	Portfolio	Research	Tools	Communications		Go paperless	2	* 1
Overview	Balances	Holdings U	Inrealized Gain/Loss	Realized Gain/Los	s History Projected Cash			
Markets 1	oday						Turn Help	ON O
Research								
Enter name	or symbol	Q 60	RECENT SEARCHE		AON AIR AAXT ANTQ			
U.S. Market	s News	Events Calendar	Sectors & Industries					
Today's E	vents (37)	June :	21st, 2013	lews Briefs				
Economics (2)	Earnings (2)	Dividends (33) Split	s (1) ECON	IOMICS: National Bar	nk of Canada Says Global GDP Grov	vth Will Remain "Tepid" This	Year at Just 3	.1%
ECONOMIC EVEN	NTS		12:52pr	n Jun 21, 2013 — MidnightTr	ader			
12:00AM ET	Market Focus	s	Nows	& Commentary				
	Economic Ev	ent						
	21	ent conomic Events	All Ne		Top Headlines After the Bell			
Sectors In	21	conomic Events	All Ne TODAY: Stock				dan	ıl
Sectors In	View More E	conomic Events	All Ne TODAY' Stock Interne	ews Before the Bell s TRENDING TOPICS News, Stocks, Trading,			ılı	d
Sectors In	View More E	conomic Events	All Ne TODAY' Stock Interne	www. Before the Bell s TRENDING TOPICS News, Stocks, Trading, ational, Company News r's Headlines	aattihaaaa			11
Sectors In	View More E	conomic Events	All Ne TODAY: Stock I Interna Today	Before the Bell B TRENDING TOPICS News, Stocks, Trading, titonal, Company News r's Headlines m ET		nt Deficit Vs \$8.3 Billion April Deficit		
Sectors In	View More E	conomic Events	All Ne TODAY: Stock I Interna Today 12:53p	ws Before the Bell s TRENDING TOPICS News, Stocke, Trading, titional, Company News 's Headlines m ET nes	Brazil Posts \$6.4 Billion May Current Accou	nt Deficit Vs \$8.3 Billion April Deficit side helped Brazil narrow its monthi is such as travel and tourism, freight	y current account and profit remittar	deficit
On a typical da	View More E	conomic Events	All Ne ToDAY Stock Interne Today 12:53p Dow Jo Interne	ws Before the Bell s TRENDING TOPICS News, Stocks, Trading, titional, Company News 's Headlines m ET nes ational	Brazil Posts \$6.4 Billion May Current Accou SAO PAULO-An improvement on the trade in May but continued heavy outflows in area brought a widening of the 12-month figure, It Read Full Story	nt Deficit Vs \$8.3 Billion April Deficit side helped Brazil narrow its monthi s such as travel and tourism, freight he Brazilian Central Bank said Friday	y current account and profit remittar	deficit
On a typical da	View More E	conomic Events	All Ne robay Stock Interne Today L2:53p Dow Jo Dow Jo Interne ay there	ws Before the Bell s TRENDING TOPICS News, Stocks, Trading, ational, Company News 's Headlines m ET ational m ET	Brazil Posts \$6.4 Billion May Current Accou SAO PAULOAn improvement on the trade in May but continued heavy outlines in area brought a widening of the 12-month figure, t Read Full Story VM Materiaux SA Announces Share Repurc	nt Deficit Vs \$8.3 Billion April Deficit side helped Brazil narrow its monthh s such as travel and tourism, freight he Brazilian Central Bank said Friday hase Program	y current account o and profit remittar 7.	deficit aces
	View More E	conomic Events	All Ne robay Stock Interne Today L2:53p Dow Jo Dow Jo Interne ay there	ws Before the Bell s TRENDING TOPICS News, Stocks, Trading, titional, Company News 's Headlines m ET nes ational	Brazil Posts \$6.4 Billion May Current Accou SAO PAULO-An improvement on the trade in May but continued heavy outflows in area brought a widening of the 12-month figure, It Read Full Story	nt Deficit Vs \$8.3 Billion April Deficit side helped Brazil narrow Its month is such as travel and tourism, freight he Brazilian Central Bank said Friday hase Program share repurchase program which wa	y current account and profit remittar	deficit nces

⁶ Not all companies' annual reports are made available via this service.

Tools

The Tools section provides robust investment screening tools for equities, mutual funds, and ETFs. You can evaluate over 20,000 mutual funds from 550 fund families including commission comparisons, and evaluate funds that participate in Pershing's Fundvest (non-transaction-fee funds) program. These straightforward screeners include pre-defined screens in which the criteria is preset and more advanced screens if you wish to filter your list of criteria (including fund family, profile, performance, risk, portfolio and analyst rating categories).

NET	XINV	ESTOR				Quick Quote C	Logout 🔒	
Home 🕶								Messages ¥
Market	Research Q	uotes & News	Tools	5				
Tools Investir	ng Tools	Resea	arch Ent	er Name or Symbol	Go			Turn Help <u>ON</u>
Tools	Screeners	Multi-Quote Co	mpare	My Watchlists	Market Alerts		Research from Industry Exp	orts
	nousands of a		glance	and find inves	tments that match	our overall	Stocks in Focus	cits
Stocks	ind objective	5.	Stock	k Screener Exam	ples		Arket Movers 7:14am ET Mar 05, 2013	
	information on st	ocks using:		oividend Yield Stoo and Yield: Top 209		View Matches	Argus Research	
	ed Stock Scre	ener			ocks : Top 20% of Tech	View Matches	8:07am ET Mar 05, 2013 Argus Research Portfolio Selector	
				Term Value Stocks		View Matches	2:37pm ET Feb 08, 2013 Argus Research	
		ds (ETF)		Screener Example			Funds in Focus	

Watchlists

Create customized watchlists of your preferred equities, mutual funds or ETFs. Set price, news, volume and watchlist alerts on the securities you are most interested in following. It is easy to set up delivery to an e-mail address of your choice. You can even put a hold on alerts while on vacation and resume them when you return.

RateBoard

View interest rates, money fund rates, stock and option indices, commodity prices and currency exchange rates via the RateBoard.

Anytime, Anywhere Access

On the road, in the office or on a mobile device you have access to your accounts at your fingertips.

NetXInvestor Mobile

Now you can access your account information from your tablet or mobile device with NetXInvestor Mobile. With this app, available via the App Store on your iPad[®] and iPhone[®], you will have fully-featured access to account information, such as balances, holdings, activity, order status, and account documents such as statements and trade confirmations. You can also view real-time quotes to help you stay ahead of the market while on the go. And with the new Mobile Check Deposit feature, you can quickly and easily fund accounts simply by using your mobile device's camera to take a picture of the check.

The NetXInvestor Mobile app is also available on the Apple Watch^{™7} to provide quick and easy glances at important financial activities. You can take advantage of the faster interactions on the watch to stay up-to-date on your balances detail, activity, holdings and also receive notifications.







⁷ Apple Watch is a trademark of Apple Inc.

Leveraging Adaptive Technology

NetXInvestor has been engineered to recognize the device being used to access it and as a result, provides the optimum experience for the screen size of that device. Full site functionality is maintained on any device; the benefit of adaptive technology is enhanced navigation and interaction points, to provide ease of use on even smaller phone screens, so there is no need to "pinch" or "pull" with fingers to try to navigate to other screens.

To access NetXInvestor Mobile:

You can download the NetXInvestor Mobile application directly to your iPad[®] or iPhone[®] by searching for 'NetXInvestor Mobile' in the App Store from your device.



Scan this code with your iPhone or iPad to download the app from the App Store

Please note that account access and system response may be affected by a variety of factors, including phone and computer networks.

Security Features

To help protect your information, multiple security measures are in place.

Upon log on, you will be prompted to enter your user ID and password on separate pages so that your security image and personal phrase can be displayed before you enter your password. This helps confirm that you're on the correct website. In addition, you will be prompted to set up an Identity Verification Code (IVC), a feature that allows you to authenticate devices or unlock a locked account after entering a code sent via voice or text message. Also, the site uses "time out" features, which will log you out in order to reduce the possibility of unauthorized access if you leave your computer unattended.

Get Connected to NetXInvestor

Having online access to your investments is critical in today's fast-paced environment. NetXInvestor provides the tools you need to manage your investments in a secure, user-friendly environment.

For more information about NetXInvestor, please contact your financial organization, or go to NetXInvestor.com.

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