

Welcome to NetExchange Client!

Below are some simple instructions to help walk you through the login process. If at any time you have difficulty logging in or need to **reset your password**, please feel free to call our home office at (800) 649-3883 Option 1.

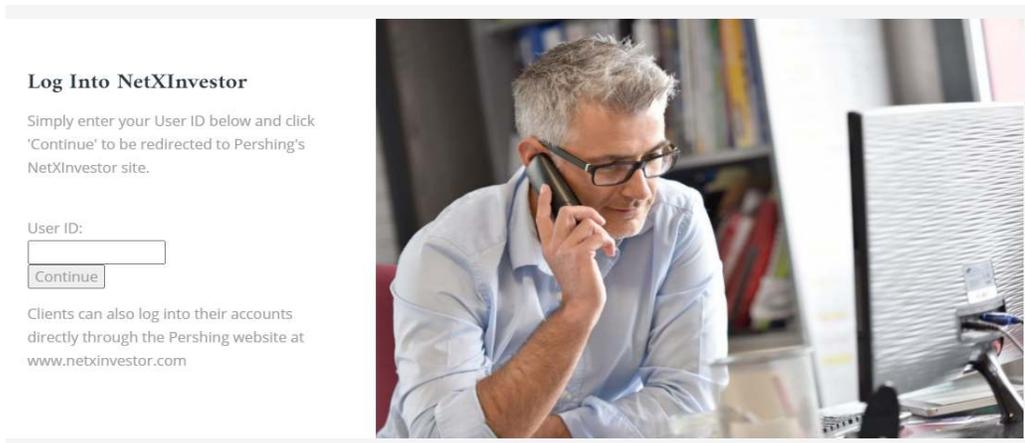
Before logging in:

Make sure your browser is set up to allow “cookies”.

1. To allow cookies, go to the ‘Tools’ menu on the Internet Explorer Toolbar
2. Choose ‘Internet Options’
3. Now select the ‘Privacy’ tab and adjust the setting. It should be Low to Medium to allow cookies.

Logging in to NetExchange Client for the First Time

1. Go to www.boltonglobal.com.
2. At the top of the page, click on the **Client Login**. You will see the screen below open in a new window.
3. **Enter User ID**
 - In the box titled ‘Log Into NetXInvestor’ type the User ID provided to you by your advisor or the Bolton home office and click the ‘Continue’ button.



- The next screen (shown below) will show the User ID that you entered

4. Enter Temporary Password

- In the Password box, enter the temporary password which was provided to you by your advisor, or the Bolton home office. Click the ‘Continue’ button. Your Financial organization number will always be 39K.

NETXINVESTOR



Switch To Accessible Theme

Login

39K

Remember User ID

Stay Safe Online
Check firm's background on BrokerCheck

Quick Quote

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.

5. Change Your Password

- Enter the temporary password again on the first line shown below
- Enter a new password in the second line. Create this new password using the following criteria:
 - Cannot be the same as User ID
 - Must be between 8 and 32 characters
 - Contain at least one alpha and one numeric character
 - Cannot contain any part of your name
 - Contains at least one uppercase and one
- Confirm your new password by entering it again in the third line
- Click the 'Change Password' button



Reset Password

Enter a new password using the Password Rules.

New Password

Confirm New Password

Tip: Passwords can contain the following special characters:

& * @ : \$ = ! - % . # ? _ |

To create an acceptable password your password must :

1. not contain BOLTON GLOBAL CAPITAL INC ID
2. contain a minimum of 8 and a maximum of 32 characters
3. contain at least one alpha and one numeric character
4. not contain your first, last or middle name
5. contains at least one uppercase and one lowercase letter

6. Security Question Set Up

- On the next screen, you will set up four (4) security questions which will allow you to register your computer, and provide additional security if you log in from a public computer.
- Select a question from the drop down menu, then type your answer in the space provided below
 - **Note:** Answers must be at least 3 characters and may only be letters, numbers or spaces
- **Repeat this process for all 4 questions**
- Under the questions you will read: "Do you want us to remember this computer, so you can avoid answering these questions upon login?"
 - Choose Yes if you want your computer to remember this page
 - Choose No if the computer you are logging on to is not your primary computer
 - **Note:** You may activate more than one computer with your questions (ex. Home computer and office computer)
- Click the 'Continue' button

Setup Your Security Questions

These questions assist in verifying your identity when logging in from different devices.

Mask Response to Secret Questions

Select a Question

Answer

Select a Question

Answer

Select a Question

Answer

Select a Question

Answer

Security Questions Rules

1. All 4 questions must be answered.
2. All 4 answers must be unique.
3. Answers must contain a minimum of 3 alphanumeric characters
4. Answers must contain only alphanumeric characters and spaces

Remember My Device

Would you like to access your accounts from this device in the future without the need to answer a security question?

Check "No" if you are using a public device

Yes No

NOTE: Your device will be remembered for 120 days.

Cancel

Continue

- The next screen will show a confirmation of the security questions. Review the questions and their answers and write them down if necessary.

7. **CONGRATULATIONS!** You have successfully completed the initial log-in for your NetExchange Client Account. You will now be directed to the opening screen of your choice.

Navigation Tips

1. If you have several accounts linked to one User ID then you will be able to toggle between them using the 'Account' pull-down at the top left of your screen.
2. When you are finished with your session it is best to click the 'Logout' hyperlink in the top right corner. This will insure that you have closed your access to the webpage so that no one may access it.

To Access NetExchange Client on Future Visits

1. Go to www.boltonglobal.com.
2. Click on Client Login--A new window will open.
3. Enter User ID
 - a. In the box on the right titled 'Secure Log On,' type the User ID provided to you by your advisor or the Bolton home office and click the 'Continue' button.
4. Register Your Computer
 - a. The first time you log in to NetExchange Client at a particular computer, you will have to answer one of your security questions to verify your identity. On the next screen, you will see one of your questions. Fill in the appropriate answer in the box.

5. **Enter Your Password**

- a. After entering your password, you will be directed to the main page, or the specific page you requested when signing up for NetExchange Client.