

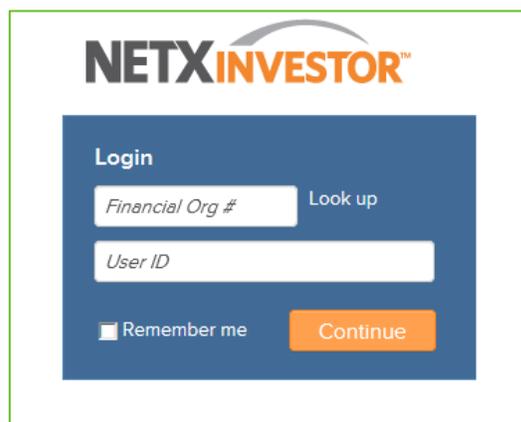
Electronic Delivery (e-Delivery) Enrollment Instructions for NetXInvestor

Thank you for choosing e-delivery of investment account communications.

Please look for a letter from Pershing LLC confirming the choices you made for e-delivery. Please review the letter for accuracy, and verify that your email address is correct; it is necessary to send this letter to ensure no disruption of important account communications. If any information is not accurate, please notify your Representative at [Phone Number] immediately.

Once You Have Received Your Information:

- > Go to www.netxinvestor.com. You will need to set up the security questions and password for your online access to your account electronic communications. This process involves several steps, but only needs to be done once at the outset.
- > On the Secure Log On section:
 - > Enter the Financial Organization Number; if you don't know this number, click "Look Up".
 - > Enter your User ID that you created on the E-Delivery request form, or that was provided to you.



Your User ID was set up when your account was established; do not select "Register Now as a New User".

Click "Continue".

Entering your Security Information:

- > In the Password field, you will need to enter a temporary password which will be provided by your firm.

Click "Continue".

- > The next screen will prompt you to create a new password.
 - > Enter the temporary password again in the Existing Password field
 - > Enter the new password you created, following the listed criteria, in the New Password and Confirm New Password fields.

Click "Continue".

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- > Once you have successfully changed your password, the next screen will prompt you to answer four security questions.
After you have answered four security questions, **click Continue**.
- > You will then be prompted to select an image and personal phrase, which will appear each time you login).
 - > Click the blue hyperlink "Select" to bring up the image library, and select an image.
 - > Once you have selected your image, enter your personal phrase.

Click "Continue".

- > The next screen will confirm your choices; please verify the information. You may edit any inaccuracies; otherwise, **click "Continue"**.
- > Finally, you will have the option to update your e-delivery preferences, such as adding additional documents, or make changes to your Account Profile (account nickname, mailing address) and My Profile (password, security questions) by clicking "Go Paperless" at the top corner of the screen. You can make these updates at any point, now or in the future.

To view your documents

- > Select the appropriate tab under the Communications Tab on left side:
 - > Statements and reports
 - > Trade confirmations
 - > Tax statements
 - > Notifications
- > Double-click the item you want to view. Once the document is open, you can either save the document to a folder on your computer by selecting the disk icon, or print the document by selecting the printer icon, from the top left corner of the screen.
- > Additionally:
 - > Click "Combine Documents" to check up to 12 documents at once.
 - > Click "Generate PDF" once you have selected multiple items, or click "Cancel" if you have changed your mind.

Please remember to keep your User ID and password in a safe secure place.

If you have any questions or issues logging into www.netxinvestor.com, please contact your Representative at [phone].

