

NETXInvestor Startup Guide



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I. Log In

To log in, go to www.netxinvestor.com



ORGANIZE YOUR ACCOUNTS
Sign up for Select.Link* to combine statements for accounts that share the same address, and receive easy-to-read summary page.

Login
Financial Org # Look Up
Enter User ID Forgot User ID?
Enter Password Forgot Password?
 Remember User ID **Continue**

Stay Safe Online
Check firm's background on BrokerCheck

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.
Register **Check Status**

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

A. Create or Change Your Password

You will be required to create your own password. Enter your **New Password** and then enter your **New Password** again in the Confirm New Password field and click **Continue**.

NETXINVESTOR

Reset Password

Enter a new password using the Password Rules.

New Password
Enter Password

Confirm New Password
Enter Password

To create an acceptable password your password must :

1. not contain CAMBRIDGE INVESTMENT RESEARCH ID
2. contain a minimum of 8 and a maximum of 12 characters
3. not contain any special characters. For example, AA-BB-CC
4. contain at least one alpha and one numeric character. For example, 1redcar2
5. not contain your first, last or middle name

Cancel **Continue**

Once logged in, enter your email address in the fields provided on the Security Email Setup page and click **Continue**.

NETXINVESTOR

Security Email Setup

For your security, we require an email address where we can send you security alert notifications.

NOTE: You must set up an email address

Send security alert notifications to the following address.

Email Address
Add a New Email Enter Email Address Confirm Email Address

Cancel **Continue**

This information is provided by Cambridge Investment Research, Inc. through Pershing LLC, member FINRA, NYSE, SIPC, a subsidiary of The Bank of New York Mellon Corporation.

II. How to Setup Your Account

A. Setup Your Security Questions

After completing the Security Email Setup information, you will need to set up your security questions. To view what is being typed in the Answer box, uncheck **Mask Response to Secret Questions**.

Select four questions with the dropdown arrow and type your answer.

To access your accounts from this device in the future without the need to answer a security question, click **Yes** under Remember My Device.

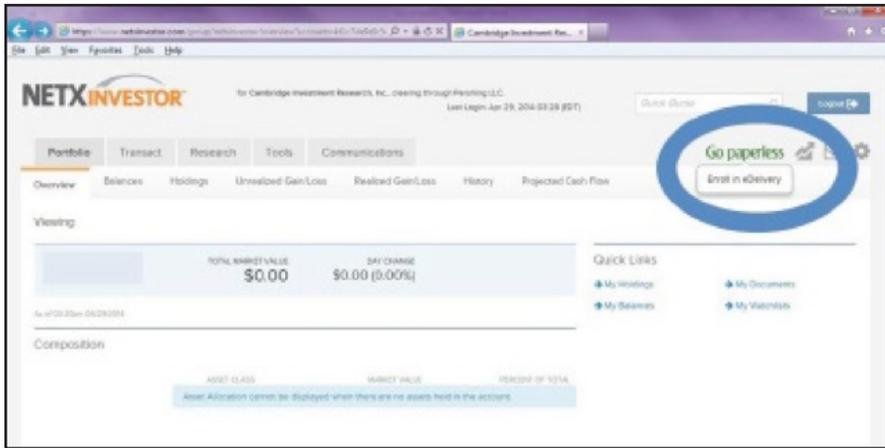
The screenshot shows the 'Setup Your Security Questions' page for NETX Investor. At the top left is the NETX INVESTOR logo. Below it, the heading 'Setup Your Security Questions' is followed by a sub-heading: 'These questions assist in verifying your identity when logging in from different devices.' A checkbox labeled 'Mask Response to Secret Questions' is checked. Below this are four rows, each consisting of a dropdown menu labeled 'Select a Question' and a text input field labeled 'Answer'. To the right of these fields is a 'Security Questions Rules' section with four numbered 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. Below the security questions section is a 'Remember My Device' section with the question 'Would you like to access your accounts from this device in the future without the need to answer a security question?' and two radio buttons for 'Yes' and 'No'. A note below states 'NOTE: Your device will be remembered for 120 days'. At the bottom right are 'Cancel' and 'Continue' buttons.

Click **Continue**.

III. How to Enroll in eDelivery

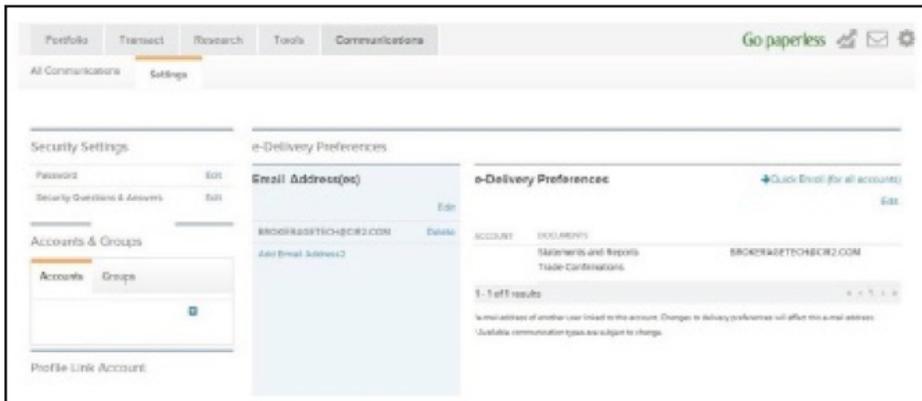
A. Setup Go Paperless Options

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



B. Add or Setup Email Address(es) for eDelivery

After clicking **Go paperless**, update or add an email address for eDelivery. Click **Edit** in the email address(es) box in the center of your screen.



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

Edit Email Address

EMAIL ADDRESS 1: CONFIRM EMAIL ADDRESS 1:

EMAIL ADDRESS 2: CONFIRM EMAIL ADDRESS 2:

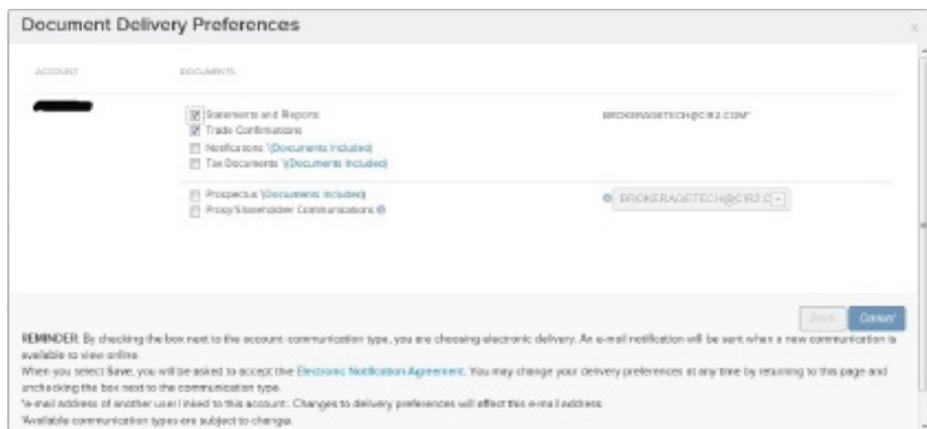
C. Setup Document Delivery Preferences

To change the documents that are sent via eDelivery and/or via paper mailings, click **Edit** under **Document Delivery Preferences**.

Click 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.



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



1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080

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