

# APEX | Clearing™

## APEX Online End Client Set Up User Guide

---

### INTRODUCTION

Use the following information to create new end user profiles in APEX Online.

---

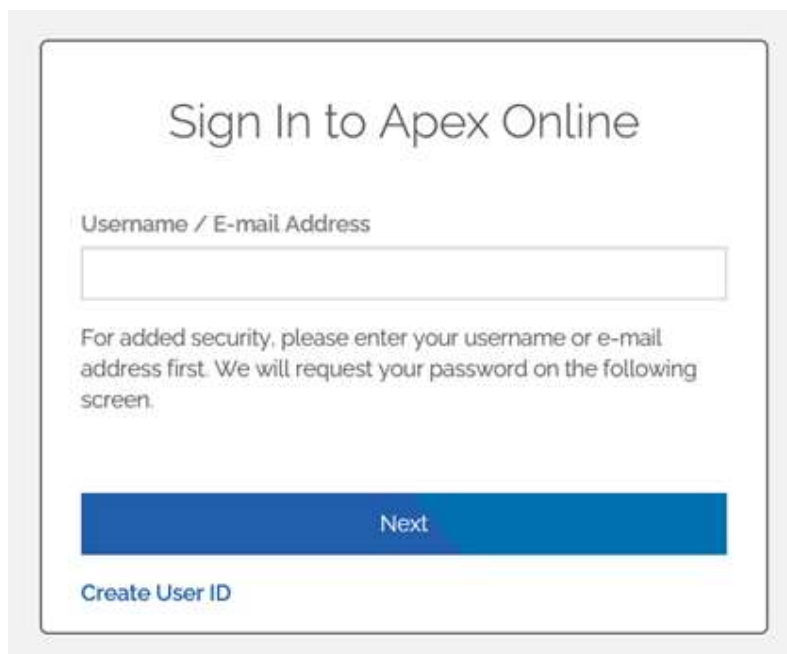
### ACCESSING APEX ONLINE

Access APEX Online using the following URL: [www.apexclearing.com](http://www.apexclearing.com).

1. Click the Head and Shoulders in the top, right corner of the screen.



2. The *Log In* screen displays as shown below.

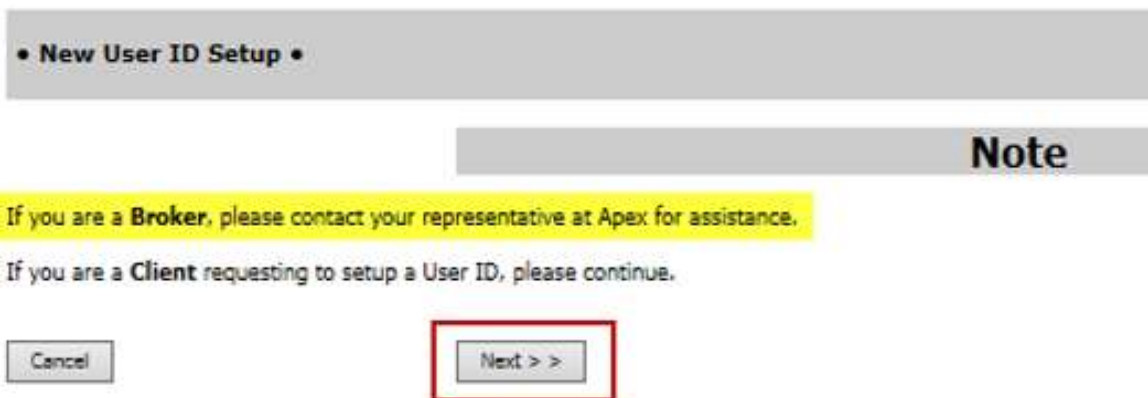
A screenshot of the 'Sign In to Apex Online' login screen. The title 'Sign In to Apex Online' is centered at the top. Below the title is a text input field labeled 'Username / E-mail Address'. Underneath the input field is a message: 'For added security, please enter your username or e-mail address first. We will request your password on the following screen.' At the bottom of the form is a large blue button labeled 'Next'. Below the button is a link that says 'Create User ID'.

Setting Up a New User ID

1. On the Log In screen, click Create a User ID as shown below.



2. The *New User ID Setup* screen appears. If the user is an end client, click **Next**.  
**NOTE:** If the user is a broker, he/she can request access by emailing [CS@apexclearing.com](mailto:CS@apexclearing.com).  
**NOTE:** Users must be on the contact sheet to request access. If the user is not on the contact sheet, he/she should have someone in the firm who is on the contact sheet submit the request.



- After clicking **Next**, use the *Step 1* screen to change the **Firm** dropdown to **10-Apex Clearing Corporation** and enter the account number in the **Account Number** field (with no dashes), and click **Next** as shown below.

• New User ID Setup •

### Step 1

**Firm**  
10-Apex Clearing Corporation

**Account Number**  
9YY05076

Cancel Next >>

- In the *Step 2* screen, type the SSN or Tax ID associated with the account (with no dashes) in the **Tax ID Number** field, and click **Next** as shown below.

• New User ID Setup •

### Step 2

To verify your identity, please enter the Tax ID Number for this account.

**Account Number** 10-9YY05076

**Tax ID Number** 132967453

Please enter your 9 digit Tax ID without dashes.

Cancel << Back Next >>

- In the *Step 3* screen, enter a valid email address in the **Email Address** field as shown below.

• New User ID Setup •

### Step 3

Please provide a current E-mail Address.

**Account Number** 10-9YY05076

**EMail Address** User@apexclearing.com

Please enter a valid e-mail address.

Cancel << Back Next >>

- In the *Step 4* screen, use the **Secret Question** field to select the desired secret question from the available dropdown. Use the **Secret Answer** field to enter the desired answer to the selected secret question as shown in the example below.

• New User ID Setup •

### Step 4

Please select a question to be asked if you forget your password.  
The answer will be required in order to have your password reset.

**Account Number** 10-9YY05076

**Secret Question**

**Secret Answer**

Please Select

- What is your mother's maiden name?
- What is your secret word?
- What is your place of birth?
- What is your pet's name?
- What is your favorite vacation spot?

- On the *Step 5* screen, enter the desired user ID and password in the available **User ID** and **Password** fields. Confirm the same password in the **Confirm Password** field. The password must be at least eight characters in length and contain at least one lower case letter, one upper case letter, one digit, and one special character (e.g., !@#%&\*|?). Click **Finish** after entering the necessary information in the fields. See the example below.

• New User ID Setup •

### Step 5

Select a new User ID and Password.

**Account Number** 10-9YY05076

**User ID**   
Please enter a User ID (alphanumeric; minimum length of 6).

**Password**   
Passwords must be at least 8 characters in length and contain at least 1 lower case letter, 1 upper case letter, 1 digit and 1 special character (e.g. !@#%&^&#x27;~|?).

**Confirm Password**

- The *New User ID Setup* page displays stating “**The User ID has been created successfully!**” The account number, user ID, and email address display as well. Click the **Click Here to Start Now!** statement when ready.

- After clicking the **Click Here to Start Now!** statement, the *Account Summary* screen displays. Use the orange buttons to navigate this screen and get further details. View Statements, Confirms, and Tax documents by clicking on the **Documents** tab on the top-right corner of the screen as shown in the example below.

**APEX CLEARING** | Accounts Logout

---

Account #: Name, or SSN \*  Process Date

Enter at least 3 letters, numbers, or spaces.

---

**SUMMARY** | **9YY05076 (Margin) Test Account** Documents -

Account Equity	Amount Available to Withdraw	Buying Power
\$0.00	\$0.00	\$0.00

**Customer Information** Customer Information Details

Correspondent	Apex Clearing Corp - Firm Accounts
Name & Address	Test Account 350 N. St. Paul St. 1300 Dallas, TX 75201
Account Registration	INDIVIDUAL
Home Phone	111-222-3333
Email Address	MTREAT@APEXCLEARING.COM
Account Status	Closed
Rep. Code	000
Tax ID	xxx-xx-7453

**Balances**

Type	Trade	Settled
<b>Totals</b>	\$0.00	\$0.00

**Positions** Positions Details

There are no positions.

All values in USD equivalent.

**Margin** Balance Details

S.M.A.	\$0.00
Margin Excess	\$0.00
Day Trade Buying Power	\$0.00

All values in USD equivalent.

**Activity** Activity Details