APEX|Clearing™

APEX Online End Client Set Up User Guide

INTRODUCTION

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

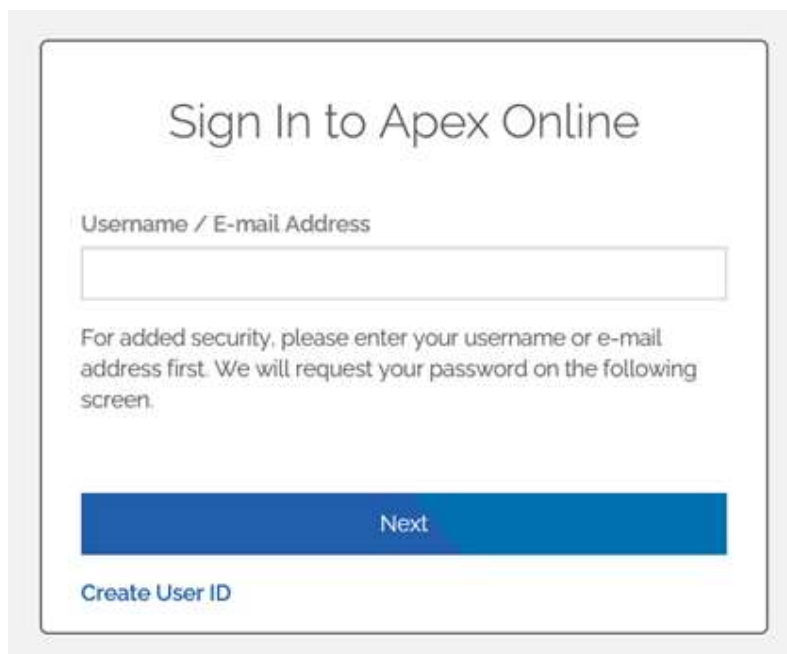## ACCESSING APEX ONLINE

Access APEX Online using the following URL: www.apexclearing.com.

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


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

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.
     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.
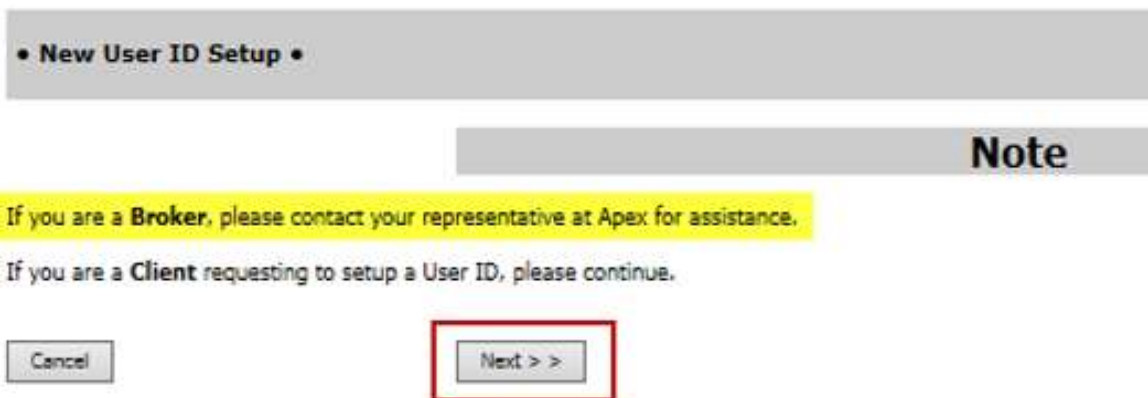
APEX | Clearing™

3. 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 > >

4. 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 > >

5. 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 > >

6. 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.

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?

Account Number   10-9YY05076

Secret Question   What is your mother's maiden name? ▼

Secret Answer   Smith   ✕

Cancel   < < Back   Next > >

7. 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   FILastname
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. !@#$%^&*~|?).

Confirm Password   ●●●●●●●●●

Cancel   < < Back   Finish

8. 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.

9. 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.