

Guide for eDelivery Enrollment via

NETXINVESTOR®

Follow these easy steps to enroll in electronic delivery (eDelivery) of your account statements, tax documents, notifications and trade confirmations through NetXInvestor.

Enrolling in eDelivery via your NetXInvestor Account

- **NetXInvestor**—Log in to NetXInvestor and click on the “Go Paperless” logo on the top right of the screen.
- **Quick Enroll**—Click “Quick Enroll” to enroll all accounts in eDelivery, or “Edit” to add accounts individually.
- **Make Your Choices**—Choose “Edit” and check the box next to the account communications you wish to receive electronically. You can return to this screen and enroll additional documents at anytime. If you choose to revert back to paper, you must contact your firm to make this change.
- **Terms and Conditions**—As the last step, you will see the Terms and Conditions of the Electronic Notification Agreement. Please read them and click “I Agree.”
- **Confirmation**—Now you’ll see a pop-up screen confirming your choices. You will also receive an email confirmation as well as a hard copy letter for security purposes.

Don't have NetXInvestor Access? Register your account online!

- Go to NetXInvestor.com and click “Register” on the home page.
- **Welcome**—Verify if online registration is an option by entering the first three digits of your account number. If verified, click “Start Registration.”

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- **Terms and Conditions**—Review the terms and conditions and check the box next to “I Agree.”
- **Profile Information**—In this step, you will provide basic user information including your name, Social Security number (SSN) and U.S. mailing address.¹
- **Identity Verification**—This step helps to safeguard sensitive financial information. Three questions help verify your identity. Each one must be answered correctly to continue. If one question is answered incorrectly, you will be presented with a fourth question. The fourth question must be answered correctly to continue.
- **User Identification and Password**—This step allows you to create a user ID and a password. You must also provide a valid email address.
- **Confirmation**—Immediately after creating the user ID, an automated email is sent to the email address provided in the prior step. Click the link in the email to complete the registration process within three days; after that time, the user ID will be deleted and you will have to restart the registration process.
- **First Login**—On first login, you will be prompted to change your password. After this, you can set up your account's security details.

¹ Beginning in 2024, international users may enroll without an SSN. User's identity will be validated with an email, account number, and the phone number on the account.

Please contact your financial professional if you have any questions about NetXInvestor or need assistance with enrolling in eDelivery.



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