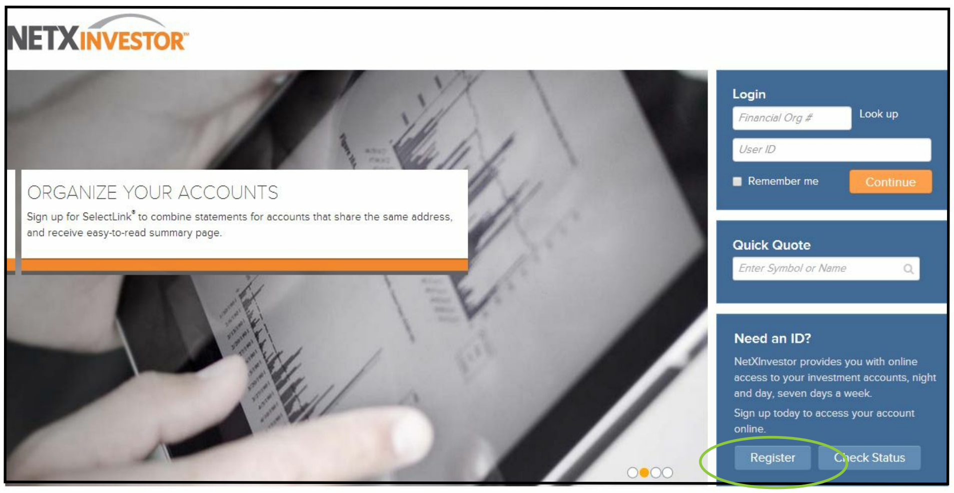
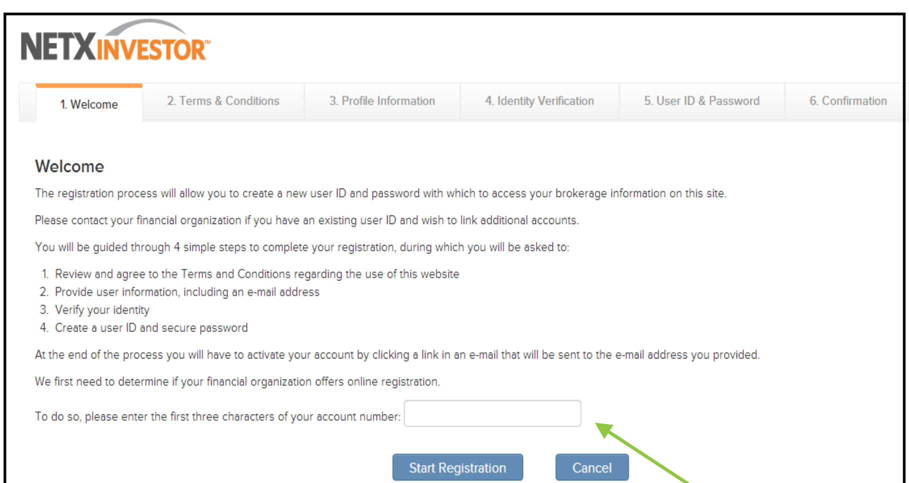
LivingStone
Wealth Planning

# NetX Investor Registration Instructions

NetX Investor provides official statements and tax documents for accounts held through Pershing. You can also GO PAPERLESS by setting up electronic delivery for these accounts. To begin, please follow the “Register” button displayed on the website as in the image below. You will need one of your account numbers for each account holder you are setting up account access for. The account number can be found on your paper statements or you can call our office at 864-520-8000 to request it.

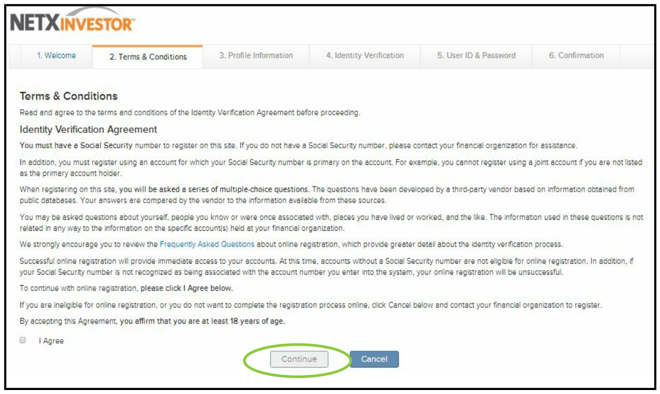



The next page should be a Welcome page which will begin a step by step registration process.

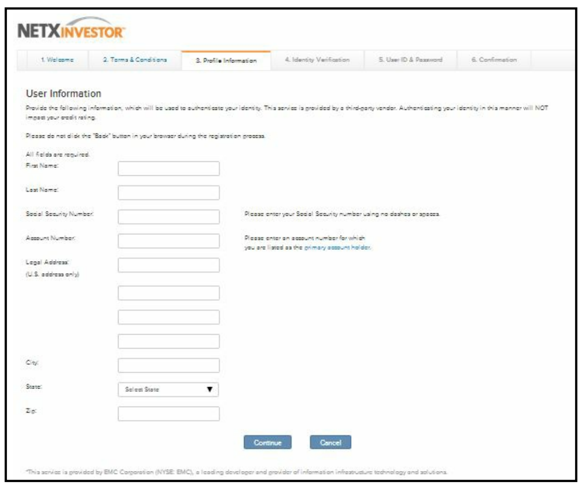



On this page you will need to enter the first three digits of your account number. After you have entered the characters, click “Start Registration”.

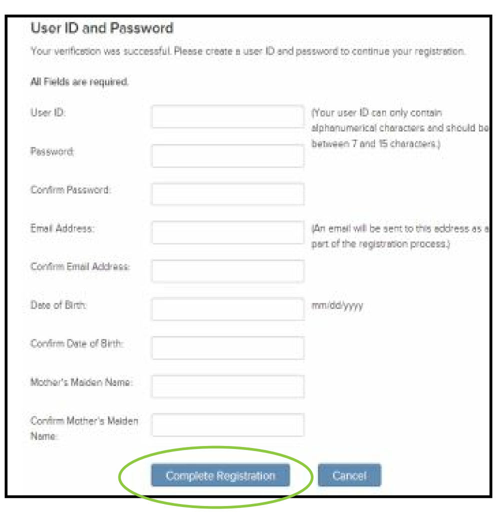
The second tab requires you to accept the NetX Investor Terms & Conditions.



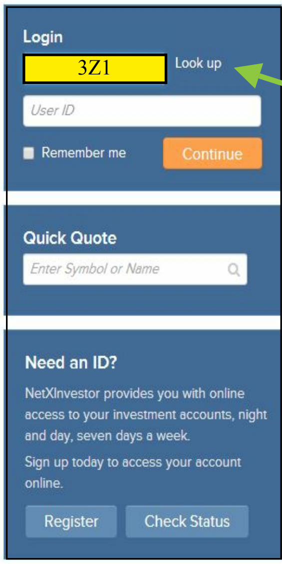

You will then be directed to the User Information tab, which will require some personal details. After completing the user information fields, a series of questions must be answered to verify your identity.




The section pictured below allows you to select your personal User ID and Password. Make note of the entries you have chosen. Then click "Complete Registration".

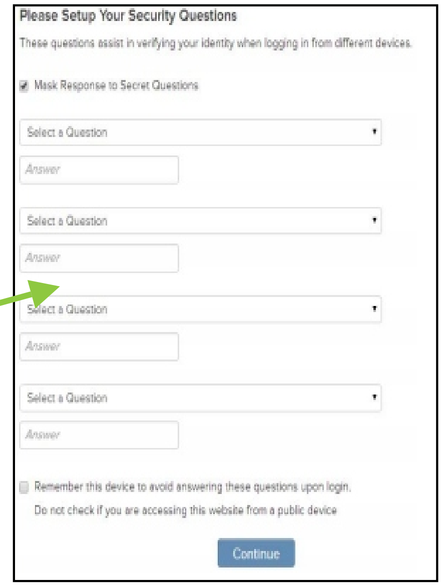


After completing your registration, a confirmation email will be sent to you. Please follow the link within the email to complete the registration process. The link will redirect you to www.netxinvestor.com.



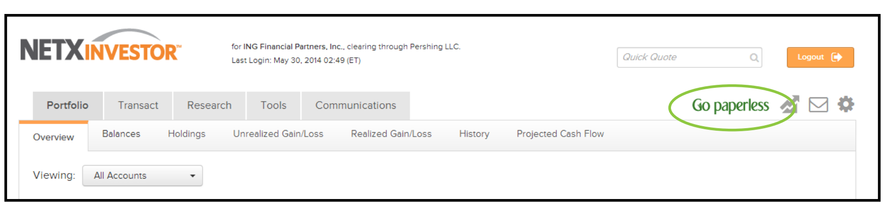

Once you arrive at the NetX Investor website, to login enter our financial organization number (3Z1) and user ID. After clicking "Continue", you will need to enter your password.

Next, you will need to set up four personal security questions. The questions can be selected from the drop down menus as shown to the right.

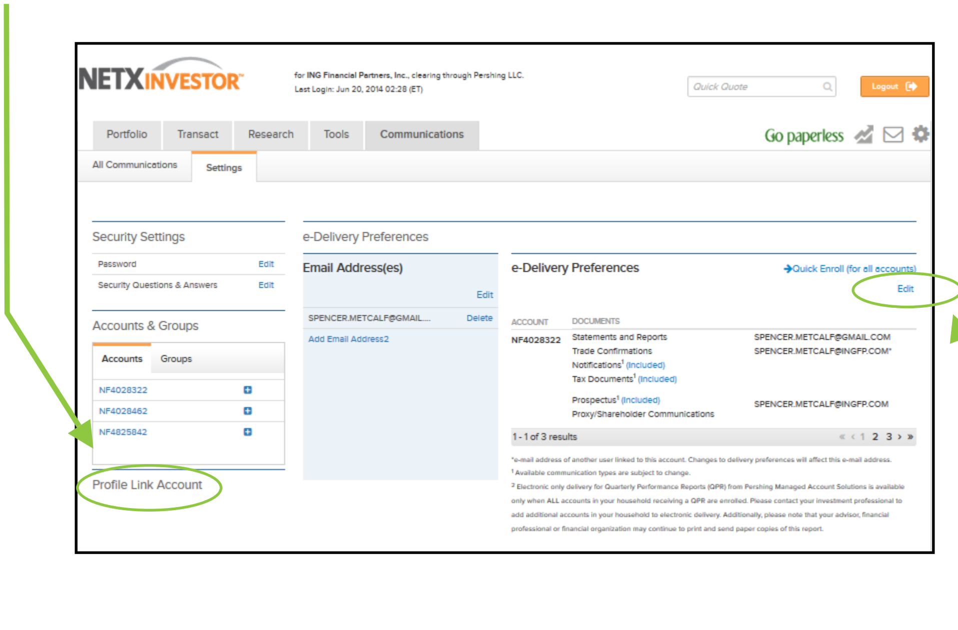



Select a security image and create a security phrase to accompany your chosen picture.

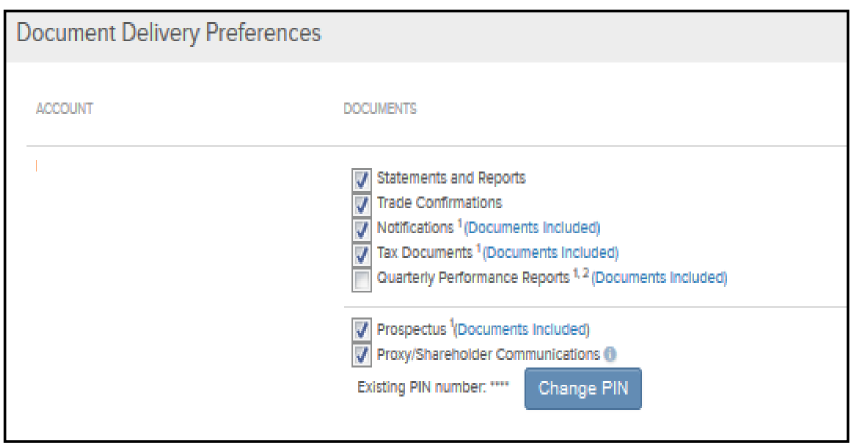

After the security image and phrase have been selected, you will be directed to your portfolio overview page. There is a green 'Go Paperless' link in the upper right hand corner. Select this link to set your statement delivery preferences.



If you have more than one account, the account linking option is located on the lower left of the page.




Under E-Delivery Preferences, click the “Edit” button to select the types of statements you would like to receive electronically. The picture below shows your customized options for going paperless.




If at any time during your registration process you have questions or problems, please give us a call at 864-520-8000, and we will gladly assist you.

*Securities & Investment Advisory Services offered through Voya Financial Advisors (member SIPC)*

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