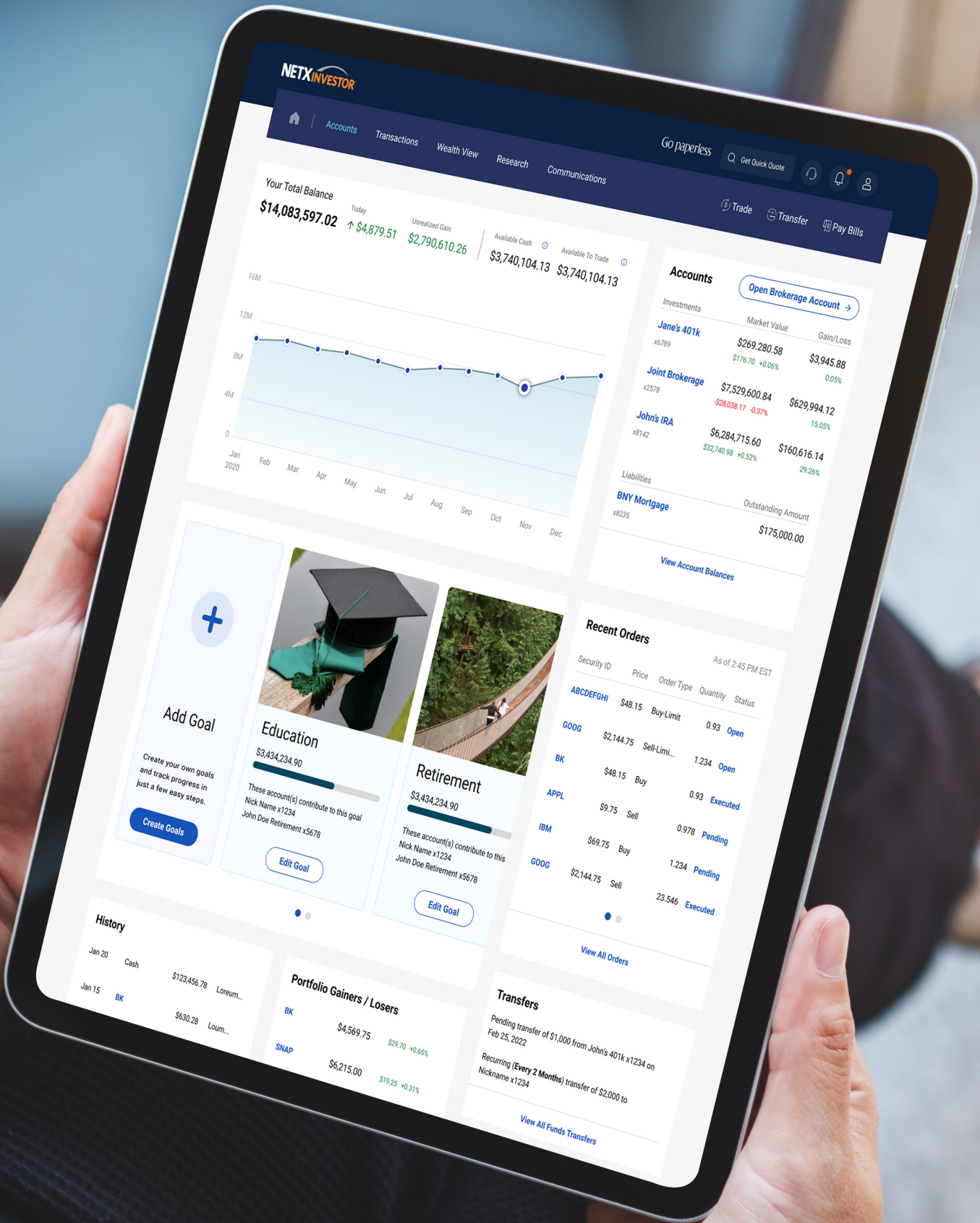


NETXINVESTOR[®]

Important Account Information at
Your Fingertips





NETXINVESTOR

Accounts Transactions Wealth View Research Communications

Go paperless

Get Quick Quote

Trade Transfer Pay Bills

Your Total Balance

\$14,083,597.02

Today

↑ \$4,879.51

Unrealized Gain

\$2,790,610.26

Available Cash

\$3,740,104.13

Available To Trade

\$3,740,104.13



Accounts

Open Brokerage Account

Investments

	Market Value	Gain/Loss
Jane's 401k x5789	\$269,280.58 \$176.70 +0.06%	\$3,945.88 0.05%
Joint Brokerage x2578	\$7,529,600.84 -\$28,038.17 -0.37%	\$629,994.12 15.05%
John's IRA x8142	\$6,284,715.60 \$32,740.98 +0.52%	\$160,616.14 29.26%

Liabilities

	Outstanding Amount
BNY Mortgage x8235	\$175,000.00

View Account Balances

Add Goal

Create your own goals and track progress in just a few easy steps.

Create Goals

Education

\$3,434,234.90

These account(s) contribute to this goal
Nick Name x1234
John Doe Retirement x5678

Edit Goal

Retirement

\$3,434,234.90

These account(s) contribute to this
Nick Name x1234
John Doe Retirement x5678

Edit Goal

Recent Orders

Security ID	Price	Order Type	Quantity	Status
ABCDEFGHI	\$48.15	Buy-Limit	0.93	Open
GOOG	\$2,144.75	Sell-Limit	1.234	Open
BK	\$48.15	Buy	0.93	Executed
APPL	\$9.75	Sell	0.978	Pending
IBM	\$69.75	Buy	1.234	Pending
GOOG	\$2,144.75	Sell	23.546	Executed

View All Orders

History

Jan 20	Cash	\$123,456.78	Lorem...
Jan 15	BK	\$630.28	Loun...

Portfolio Gainers / Losers

BK	\$4,569.75	\$29.70 +0.65%
SNAP	\$6,215.00	\$19.25 +0.31%

Transfers

Pending transfer of \$1,000 from John's 401k x1234 on Feb 25, 2022
Recurring (Every 2 Months) transfer of \$2,000 to Nickname x1234

View All Funds Transfers

In today's digital world, we all want convenience when it comes to managing our finances. That's why we offer you access to NetXInvestor, an intuitive online investment portal, so you can get instant access to your account activity, balances, portfolio holdings and more.

Convenient



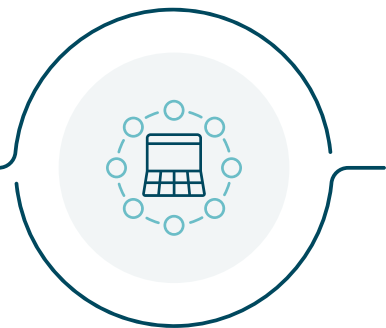
Enjoy the convenience of being able to access your account information online, or on the go. Download the mobile app to easily view your accounts from the palm of your hand.

Secure



Account access is secure – password protection, multi-factor authentication, "time-out" features, and biometric identification for mobile devices are in place to help secure your account.

Digital



A streamlined digital experience with a modern display of your account information. You'll get access to charts, graphs and other features that help you understand your investment information and monitor your portfolio.

KEY FEATURES

Designed for investors like you, NetXInvestor offers a wide range of resources and easy access to your account information.

VIEW A FULL PICTURE

From the home page, stay on top of your investments and access a high-level overview of your portfolio – clearly displaying market valuation of your accounts.

HOLDINGS DETAIL

Access a detailed summary of your holdings and quickly search by asset type, view holdings by account, drill down to details including tax lot to tax lot details.

STAY INFORMED

Get a view of your recent transactions and history. We store up to two years of transaction history, which you can filter and organize in a way that makes sense to you.

CUSTOMIZE VIEWS AND SETTINGS

Adjust display settings, nickname or group accounts in a way that helps you quickly identify your accounts. Complete simple account updates if you ever need to modify your notification contact information, one-time passcode methods or change your password.



USEFUL TOOLS

Here are a few key features and some of the useful things you can do online – while helping to save time by going digital.

FINANCIAL GOAL TRACKING

Create and track financial goals right from the home screen. Optional self-service features are available to develop a more detailed financial plan.

DIGITAL AUTHORIZATION

Set up digital authorization for an easy and secure way to provide approval to your financial professional to move money on your behalf. The process is simple, secure and streamlined.

FUND ACCOUNTS AND TRANSFER MONEY

Looking for an easier way to fund your accounts and transfer money? Our funds transfer page is designed to be streamlined and intuitive for you to move money.

MARKET INFORMATION & RESEARCH

Access quotes, news, and updates to keep abreast of the latest market conditions. Set price, news, and volume alerts on the securities you want to track and have them texted or emailed to you.

Note: Your financial organization might not enable you to access or view all the features described in this brochure. Contact your financial organization if you have any questions.



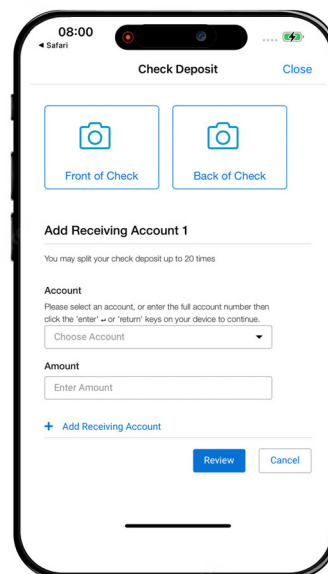
ANYTIME, ANYWHERE ACCESS

On the road, at home, or in the office, access to your account information is available at your fingertips with the mobile app. It includes all of the great features you get from your computer with added benefits like biometric authentication to log in quickly and easily with facial or fingerprint recognition.



LOOKING FOR THE MOBILE APP?

Download the NetXInvestor app directly to your mobile device. It's available for iOS devices on the Apple App Store and for Android devices on the Google Play Store by searching for "NetXInvestor".



NEED TO FUND YOUR ACCOUNTS QUICKLY?

No problem. Mobile check deposit and other digital options to transfer funds allow you to do so quickly, easily, and securely.

SAVE TIME AND PAPER

Do you find yourself searching through files filled with paperwork and not finding what you need? Search smarter and faster – online. With eDelivery, you can access 10 years of statements and seven years of tax information through NetXInvestor.

GOPAPERLESS 

WANT TO LEARN MORE?

Contact your financial organization
to take advantage of NetXInvestor.





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