

**Online self-registration is limited to these accounts types:**

Retirement Accounts  
Individual Accounts  
Joint Accounts (where you are the primary account holder)

All other account types should be submitted to the back office via the User ID and e-Delivery Request Form.

**Instructions for NETXInvestor Online Self-Registration:**

1. Go to: [netxinvestor.com](http://netxinvestor.com).
2. Select **Register**.
3. Review the **Welcome Screen** and click **Next**.
4. Review the terms and conditions regarding identity verification and click **I Agree**.
5. Provide user information, including your name, a valid email address, Social Security number, legal U.S. address, and account number on which you are listed as the primary account holder.
6. Verify your identity and proceed.

**Need an ID?**

NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week.

Sign up today to access your account online.

[Register](#)[Check Status](#)

To verify your identity and for the safety and security of your information, you will be asked three questions:

- If you provide the correct answer to all three questions, you will be taken to the next step.
- If you fail to provide the correct answer for one question, the fourth question will be displayed. If your answer to the fourth question is correct, you will be taken to the next step.
- If you fail to provide the correct answer for more than two questions, a message displays indicating you have failed to verify your identity. You can either try again later or contact your back office for assistance.

7. Create a **temporary user ID and password**.
8. Enter **email address, date of birth and mother's maiden name**.
9. An email with further instructions is sent to the entered email address. Action should be taken within three days of receiving the email.
10. Click the link in the email within three days to make the **user ID** permanent.
11. Create personalized security questions when prompted.
12. The self-registration for online access is completed.
13. If you desire e-delivery, click **Go Paperless** and follow the instructions to add email address and create paperless preferences.