

Things to Do and View with NetXInvestor – User Guide

netinvestor.com/nxi/welcome

Now you can easily monitor your Pershing Investment accounts through the NetXInvestor portal.

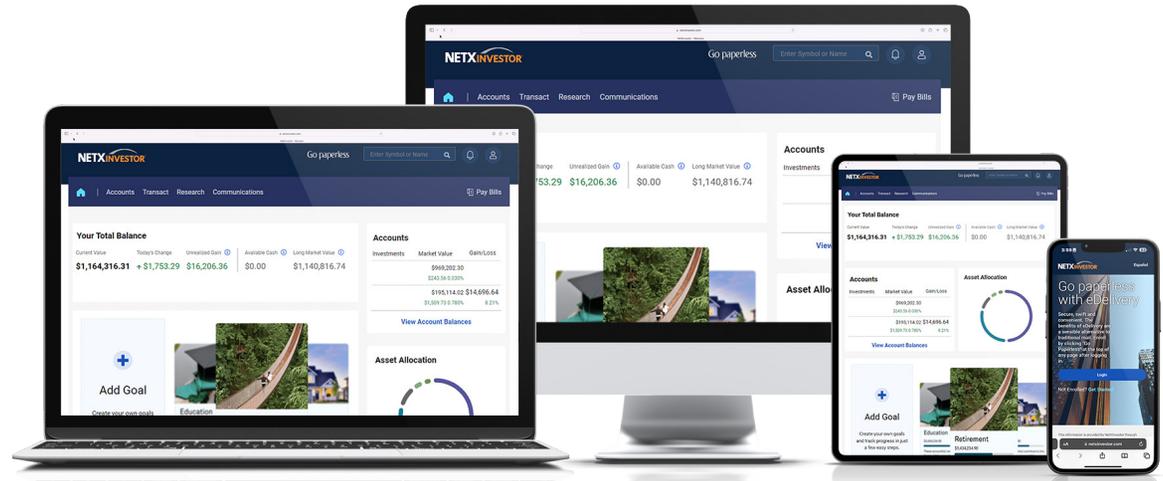
Getting Started

Log in to go to netinvestor.com/nxi/welcome. If you've never logged in to NetXInvestor.com, click **Get Started** under the **Login** button. You'll need to enter the first three characters of your account number, which is **3TN**, to complete your online registration and create a username and password. The Financial Organization # is **52P**. To view and monitor your accounts online, simply **log in**:

Need Help Logging In

From the Log In page, click **Forgot User ID?** or **Forgot Password?** to reset your username or to look up your password.

NetXInvestor Lets You Manage Your Accounts Securely—Anytime, Anywhere



Monitor your accounts online

View your balances, holdings, and transactions on all your Pershing Investments accounts, including those that Alterra manages. Click **Accounts** to get started.

View and Print Statements

Get up to 10 years of statements and confirmations online. Click **Communications**, then go to **Statements & Reports**.

Get tax forms and reports

View your tax forms, reports, and confirmations online, and monitor your year-to-date tax situation. Click **Communications**, then go to **Tax Documents** for year-end tax statements.

Questions?

Contact your Client Care with any questions about your accounts.