NETXINVESTOR REGISTRATION GUIDE

Below are the instructions an investor with brokerage accounts held with Pershing should follow to register and setup online access, as well as set up electronic delivery preferences.

Who can register on NetXInvestor?

If there is a natural person as an account holder with the following information on file:

- Full name

- Date of birth (DOB)

- Social Security Number (SSN)

Eligible registration types:

- Individual

- Joint

- Traditional IRA

- Roth IRA

- Rollover IRA

For more information on eligible registration types or assistance with registering on www.netxinvestor.com, please call Cambridge Investment Research, Inc. at 888-245-0452.

1. Visit www.netxinvestor.com and select **Register Now**
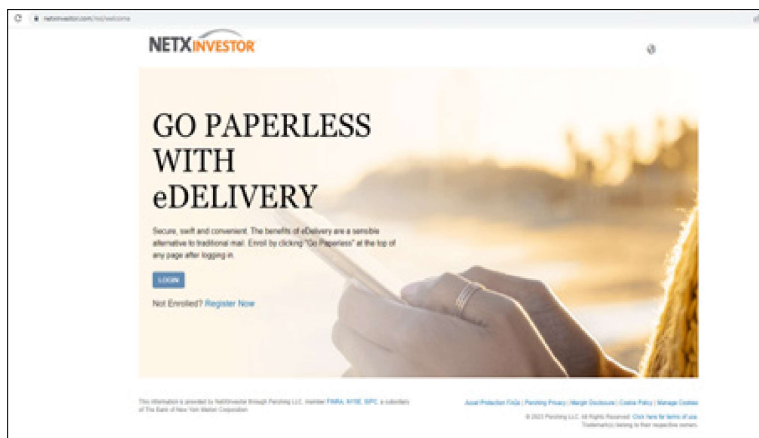
2. Enter the first three characters of the account number and select **Start Registration**

3. Read through Terms & Conditions. Check I agree and select **Continue.**

4. Complete all fields under **User Information** and select **Continue.**

5. Complete the required Identity Verification questions and select **Continue**.

6. Create a User ID and Password by completing the required fields. Select **Continue**. Note: refer to Password Rules when creating a password.
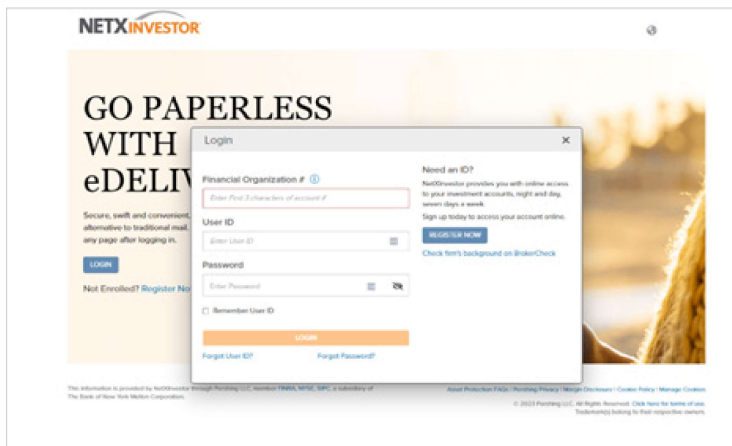
7. The following confirmation screen will appear once completed. A confirmation email will be sent to the email address provided.
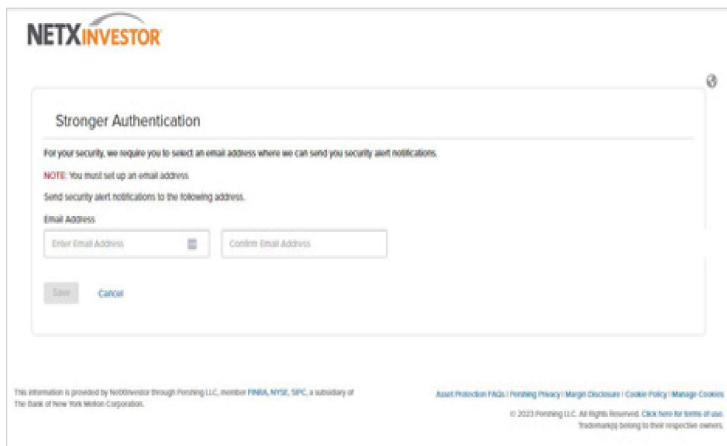

8. Open the confirmation email and select **Click Here** to be redirected to the NetXInvestor webpage to finish the registration process.

9. Select **Login** > enter the Financial Organization # **5CR** > enter User ID and Password > select **Login**

10. Enter and re-enter an email address to receive security alert notifications, then select **Save**.

11. A confirmation email, like the below, will be received to confirm this update.

Dear Client,

Our records indicate that on 05/16/2023, the security email address associated with your CAMBRIDGE INVESTMENT RESEARCH INC account was updated. You previously provided this email address and we use it to send important messages related to your accounts and account security.

If you did not make this update, please contact CAMBRIDGE INVESTMENT RESEARCH INC for further assistance. Your timely response to this message helps ensure the security of your account.

This message is automatically generated. Please do not reply directly to this message.

Thank you.

12. Select **Contact Method** to setup a One-Time Passcode. This will be used as a 2-Factor Authentication for NetXInvestor login.

13. Choose from SMS/Text, Email, or Voice Call to receive a One-Time Passcode. Complete all fields and select **Verify.** Note: Device Nickname is a required field.

    SMS/Text:

Email:

Voice Call:

14. Enter the One-Time Passcode and select **Verify**.

15. Optionally, check **Remember My Device** and select **Save**. Checking Remember My Device will eliminate the requirement to get a One-Time Passcode upon login for 120 days on that specific device.

16. If Remember My Device is selected, an email like below will be sent:

17. The following message indicates the information provided will be used in the future to access accounts online. Select **Ok**.
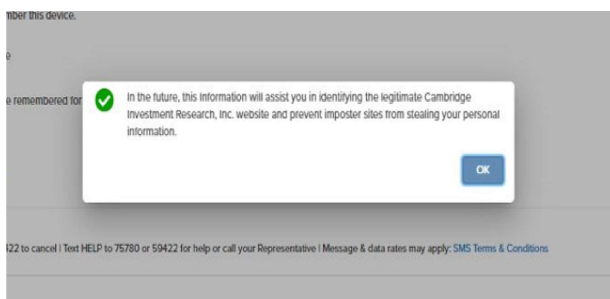
18. If there are additional eligible accounts open at the time of registration, the following screen will display to link these accounts. Check applicable boxes and select **Submit**.

19. To link new account(s) opened after registering select **Communications** > Settings.

20. In the lower left-hand corner under **Account Linking** check applicable boxes and select **Submit** to gain access to the account(s).

21. After going through any additional security measures, the following screen will enable **Electronic Delivery.** Complete the required fields and select **Accept**.

22. If the previous screen is missed or Remind Me Later was selected, electronic delivery can be setup by selecting **Go Paperless** in the upper right-hand corner of the screen.