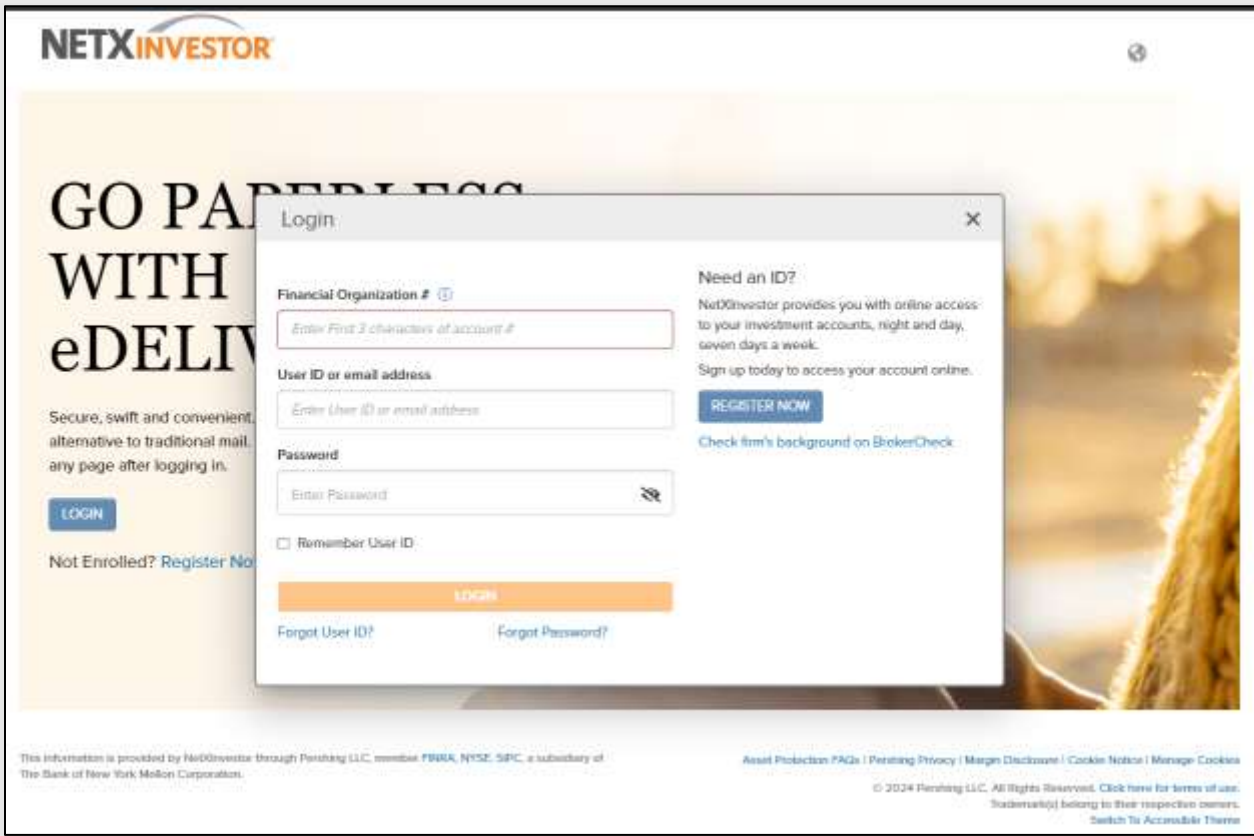


NetXInvestor: How To Guide

This document's objective is to assist you in accessing Pershing's investor-facing application and the Communications (reports) section.

Logging In

Go to <https://www.netxinvestor.com/nxi/welcome> and click on the Login button. You may want to add this page to your bookmarks for easy access in the future.



You will need to supply three pieces of information to gain access to the application. The first is Geneos' Financial Organization #, which is **6NM**. Next, supply your User ID and secure password. Consider checking the box next to Remember User ID for future use. Then click the Login button.

Don't know your User ID or password?

A User ID and temporary password were established when your account(s) was opened or when you signed up for the e-delivery of statements and documents. If you have forgotten your User ID, please contact us for assistance. Your temporary password is eight characters. The first two characters are the first two letters of the primary account holder's mother's maiden name, capitalized. The next six characters are the primary account holder's date of birth following the DDMMYY format. For example,

MA050556. You will be directed to change your password upon your initial login. Passwords are case-sensitive. Be sure to store your login credentials in a safe place.

Please contact us if you've forgotten your User ID or secure password, and we will reset your login credentials.

Accessing Communications

Once logged into the application, you are presented with a dashboard of various content options.



Click on Communications to reveal links for viewing Statements, Trad Confirmations, Tax Documents, Notifications, and Shareholder Communications.



Select Tax Documents and choose All Accounts from the drop-down list.

Select the Time Period. The default should be the most recent tax year. Click Apply Filter, and the relevant tax documents should appear. You should now be able to open and/or download the PDF files.