

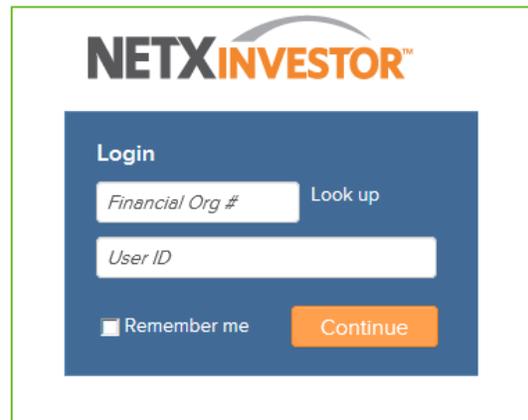
Electronic Delivery (e-delivery) Enrollment Instructions for NetXInvestor

Thank you for choosing e-delivery of investment account communications.

Please look for a letter from Pershing LLC confirming the choices you made for e-delivery. Please review the letter for accuracy, and verify that your email address is correct; it is necessary to send this letter to ensure no disruption of important account communications. If any information is not accurate, please notify your representative at 303-690-5070 immediately.

As Soon As You Receive Your Information:

- > Go to www.netxinvestor.com. You'll need to set up the security questions and password for your online access to your account electronic communications. This process involves several steps, but only needs to be done once.
- > On the Secure Login section:
 - > Enter the Financial Org Number: **6nm**
 - > Enter the User ID you created on the e-delivery request form, or that was provided to you.



Your User ID was set up when your account was established; do **NOT** select "Register Now as a New User."

Click "Continue."

Entering your Security Information:

- > In the Password field, you will need to enter a temporary password, which will be provided by your firm.
Click "Continue."
- > The next screen will prompt you to create a new password.
 - > Enter the temporary password again in the *Existing Password* field
 - > Enter the new password you created, following the listed criteria, in the New Password and Confirm New Password fields.
Click "Continue."
- > Once you have successfully changed your password, the next screen will prompt you to select and answer four security questions.

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- > Screen-Print this list of questions and file it, because you may need to answer these same questions sometime in the future.

After you have answered four security questions, **click Continue.**

- > You will then be prompted to select an image and personal phrase, which will appear each time you login.
 - > Click the blue hyperlink "Select" to bring up the image library, and select an image.
 - > After you've selected your image, enter your personal phrase.
Click "Continue."
- > The next screen will confirm your choices; please verify the information. You may edit any inaccuracies; otherwise, **click "Continue."**
- > Finally, you will have the option to update your e-delivery preferences, such as adding additional documents, or make changes to your Account Profile (account nickname, mailing address) and My Profile (password, security questions) by clicking "**Go Paperless**" at the top corner of the screen. You can make these updates at any point, now or in the future. To go paperless for Proxies, you must enter a PIN; you may have done this when you opened the account. Note the PIN here:

To view your documents

- > Select the appropriate tab under the Communications Tab on left side:
 - > Statements and reports
 - > Trade confirmations
 - > Tax statements
 - > Notifications
- > Double-click the item you want to view. Once the document is open, you can either save the document to a folder on your computer by selecting the disk icon, or print the document by selecting the printer icon, from the top left corner of the screen.
- > Additionally:
 - > Click "Combine Documents" to bundle as many as 12 documents at once.
 - > Click "Generate PDF" once you have selected multiple items, or click "Cancel" if you have changed your mind.
 - >

Please remember to keep your User ID and password in a safe, secure place.

If you have any questions or issues logging into www.netxinvestor.com , please contact your Representative at 303-690-5070.

