



# NETXINVESTOR SELF-REGISTRATION

## Information and Instructions

PLEASE NOTE: If your account is registered using a Tax Identification Number (TIN), prior to taking the steps below, you must contact your financial advisor to have your online access enabled.

1. Access the web page at [www.wfsview.com](http://www.wfsview.com).
2. Click the **Register** button at the bottom of the web page.
3. Review and agree to the terms and conditions regarding identity verification. To do so, check the box marked Accept and click **Continue**.
4. Provide information for the primary account holder, including Social Security Number and the legal address listed on the account.
5. Provide a valid e-mail address.
6. Verify your identity by answering a few multiple choice questions.

7. Create a user ID and secure password.

NOTE: when creating a secure password, the password must:

- contain a minimum of 8 and a maximum of 12 characters
- contain at least one alphabetical and one numeric character. For example: 1redcar2
- not contain any special characters. For example: AA-BB-CC
- not contain your first, last, or middle name

8. **IMPORTANT:** You must activate the account by clicking the link in an e-mail that will be sent to the e-mail address provided. You must do this within three calendar days of registering.



## HAVE MULTIPLE ACCOUNTS? LINK THEM:

Account linking allows you to link all accounts that have the same Social Security Number as yours. Through account linking, you can access all of your account information in one place.

PLEASE NOTE: You can link accounts only if you have created your User ID via online self registration.

1. On the NetXInvestor home page, click **Settings**.
2. In the Account Linking section, select the account to link by clicking on the **check box** and click **Submit**.



## IDENTIFY YOUR ACCOUNTS QUICKLY... WITH A NICKNAME!

A nickname appears to the left of each account number, and lets you quickly identify your accounts.

1. On the NetXInvestor home page, click **Settings**.
2. In the Accounts area, click the **(+)** icon against the required account.
3. In the space provided, enter a nickname for the account and click **Save Nickname**.



## TO “GO PAPERLESS.”:

1. Log into [www.wfsview.com](http://www.wfsview.com).
2. If this is your first time logging in since registering, you will need to answer a few security questions to further protect information.
3. Click on the go paperless icon at the top right corner of the page.
4. If you self-registered, the documents available for this account only will be displayed and you can then choose the delivery options. If you have multiple accounts and would like them all viewable under one login, please contact your advisor.
5. Check the box for both Statements and Reports and Trade Confirmations, then click the **Save** button.
6. Review the Electronic Notification Agreement, and then scroll to the bottom of the agreement and click the **I Accept** button.
7. You will receive an on-screen confirmation that the changes to your Document Delivery Preferences have been updated successfully. You are now set up to receive Trade Confirmations, Statement, and Report Notifications via e-mail.