



## Receiving Electronic Statements



To begin receiving electronic statements instead of mail statements, please click the link [www.larryrosenthal.com](http://www.larryrosenthal.com). Once on the homepage, click the box labeled “Client Login” and go to NetXInvestor button. Once you are there, please click the ‘register’ button that is listed on the bottom right of the browser page.

A screenshot of a login form on a blue background. The form has a title 'Login' and contains several input fields and buttons. The first input field contains the text '3z1' and is highlighted with a yellow border. To its right is a 'Look Up' button. Below this are two more input fields labeled 'Enter User ID' and 'Enter Password', with 'Forgot User ID?' and 'Forgot Password?' links to their right. At the bottom left is a checkbox labeled 'Remember User ID', and at the bottom right is a 'Continue' button. Below the form, there is a small text block: 'Stay Safe Online' and 'Check firm's background on BrokerCheck'.A screenshot of a 'Quick Quote' form on a blue background. It features a search bar with the placeholder text 'Enter Symbol or Name' and a magnifying glass icon on the right side.A screenshot of a 'Need an ID?' form on a blue background. The text reads: 'NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week. Sign up today to access your account online.' Below this text are two buttons: 'Register' and 'Check Status'. The 'Register' button is circled in white.

Once you click register, you will be transferred to another page. There, you will need to enter the first three characters of your account number. If you are unaware of your account number, please refer to one of your paper statements or call 703-330-3100. Once the account number is entered, click the ‘Start Registration’ button.

Online Registration

1. Welcome 2. Terms & Conditions 3. Profile Information 4. Identity Verification 5. User ID & Password 6. Confirmation

### Welcome

The registration process will allow you to create a new user ID and password with which to access your investment information on this site.

Please contact your financial organization if you have an existing user ID and wish to link additional accounts.

You will be guided through 4 simple steps to complete your registration, during which you will be asked to:

1. Review and agree to the Terms and Conditions regarding the use of this website
2. Provide user information, including an e-mail address
3. Verify your identity
4. Create a user ID and secure password

At the end of the process you will have to activate your account by clicking a link in an e-mail that will be sent to the e-mail address you provided.

We first need to determine if your financial organization offers online registration

To do so, please enter the first three characters of your account number:

After you click 'Start Registration', you will be sent to the next page which asks you to agree to the terms and conditions. Once the 'I agree' box is chosen, you will be directed to another page.

This next page, titled 'User Information', asks you to include your first and last name, your social security number, and address. Once all the forms are filled out and 'Continue' is selected, you will be directed to another page, which asks you security questions.

### User Information

Provide the following information, which will be used to authenticate your identity. This service is provided by a third-party vendor. Authenticating your identity in this manner will NOT impact your credit rating.

Please do not click the "Back" button in your browser during the registration process.

All fields are required.

First Name:

Last Name:

Social Security Number:

Account Number:

Please enter an account number for which you are listed as the [primary account holder](#).

Legal Address:  
(U.S. address only)

City:

State:

Zip:

[Continue](#)

[Cancel](#)

Once the security questions are answered, you will be sent to the page titled 'User ID and Password'. After the fields are completed, please click on the 'Complete Registration' box.

## User ID and Password

Your verification was successful. Please create a user ID and password to continue your registration.

All Fields are required.

User ID:	<input type="text"/>	(Your user ID can only contain alphanumeric characters and should be between 7 and 15 characters.)
Password:	<input type="password"/>	
Confirm Password:	<input type="password"/>	
Email Address:	<input type="text"/>	(An email will be sent to this address as a part of the registration process.)
Confirm Email Address:	<input type="text"/>	
Date of Birth:	<input type="text"/>	mm/dd/yyyy
Confirm Date of Birth:	<input type="text"/>	
Mother's Maiden Name:	<input type="text"/>	
Confirm Mother's Maiden Name:	<input type="text"/>	

[Complete Registration](#)

[Cancel](#)

After you complete the registration, you will receive an email that confirms your registration. Please click on the link labeled 'click here' which will redirect you to a new page to login. If the login asks for the financial organization #, please type '3Z1'.

Next, you will need to select and answer 4 personal security questions. The questions can be selected from the drop-down menus.

**Please Setup Your Security Questions**  
These questions assist in verifying your identity when logging in from different devices.

Mask Response to Secret Questions

Select a Question  
Answer

Select a Question  
Answer

Select a Question  
Answer




Select a Question  
Answer

Remember this device to avoid answering these questions upon login.  
Do not check if you are accessing this website from a public device

Continue

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Portfolio Transact Research Tools **Communications**

**Go paperless**   

All Communications Settings

At the top right of the next page, please select the 'Go paperless' option and 'Update Preferences'.

### Go paperless Start with less paper. End with less clutter.

Enrolling one of your account communications for e-delivery is a good starting point. Imagine how convenient it would be to access everything online. You can:

- Receive an e-mail notification when your documents are available to view.
- Gain access to your account information faster, because there's no waiting for paper documents to arrive in the mail.
- Download and save documents, or print them if necessary-it's anytime access\*, at your convenience.
- Access statements online for 10 years, tax documents for seven years and trade confirmations for six years.

Choose e-delivery of your account communications today. Think of it as an online file cabinet, where you can quickly search for and find what you need.

To get started, simply click **Update Preferences** below.

\*Internet access and availability required.

**Update Preferences** Remind Me Later No Thanks

Once selected, you will be redirected to the 'e-Delivery Preferences' section. Please click on the 'Edit' button where you will be asked to select the types of statements you would like to receive electronically.

e-Delivery Preferences

Email Address(es) Edit

Delete

Add Email Address2

e-Delivery Preferences

[Quick Enroll \(for all accounts\)](#)

[Edit](#)

ACCOUNT	DOCUMENTS
	Statements and Reports •
	Trade Confirmations
	Notifications <sup>1</sup> (Included)
	Quarterly Performance Reports <sup>1,2</sup> (Included)
	Prospectus <sup>1</sup> (Included)
	Proxy/Shareholder Communications

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\*e-mail address of another user linked to this account. Changes to delivery preferences will affect this e-mail address.

<sup>1</sup> Available communication types are subject to change.

<sup>2</sup> Electronic only delivery for Quarterly Performance Reports (QPR) from Pershing Managed Account Solutions is available only when ALL accounts in your household receiving a QPR are enrolled. Please contact your investment professional to add additional accounts in your household to electronic delivery. Additionally, please note that your advisor, financial professional or financial organization may continue to print and send paper copies of this report.