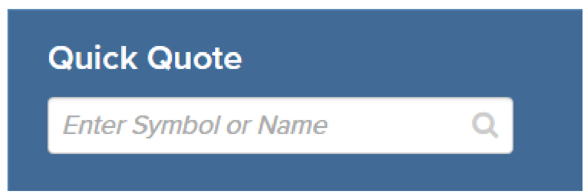
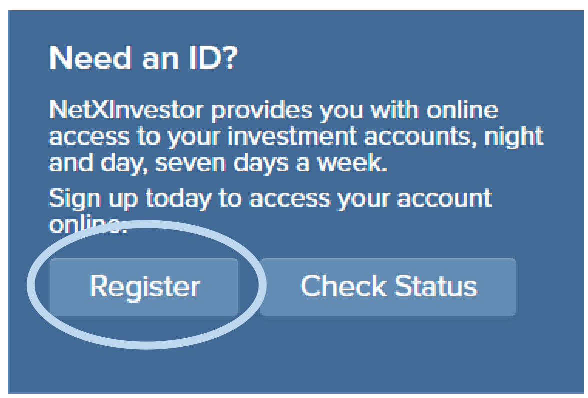
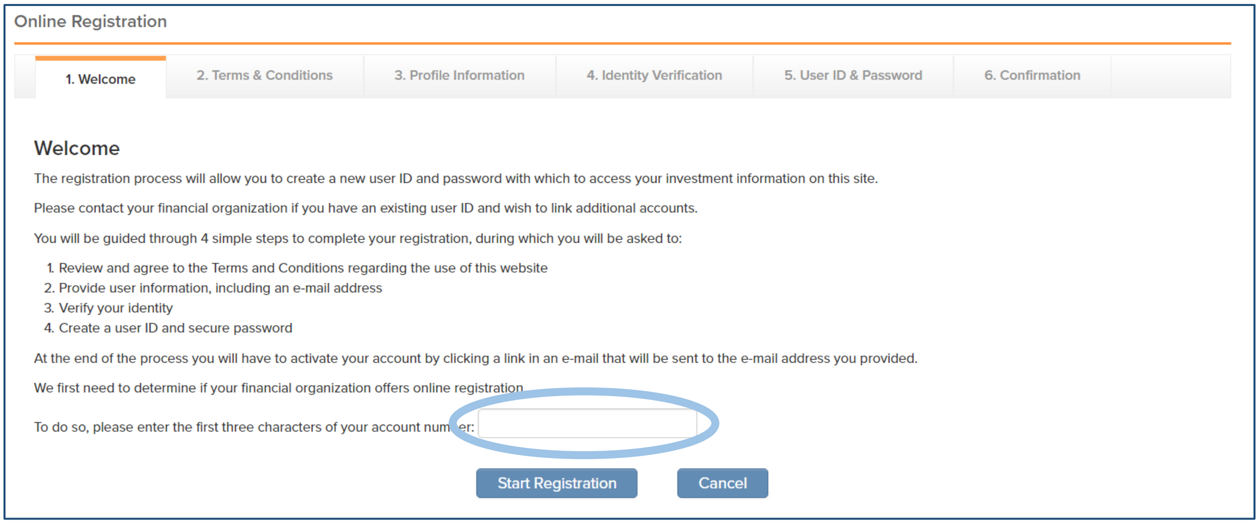
Receiving Electronic Statements

To begin receiving electronic statements instead of mail statements, please click the link 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.





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.



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)

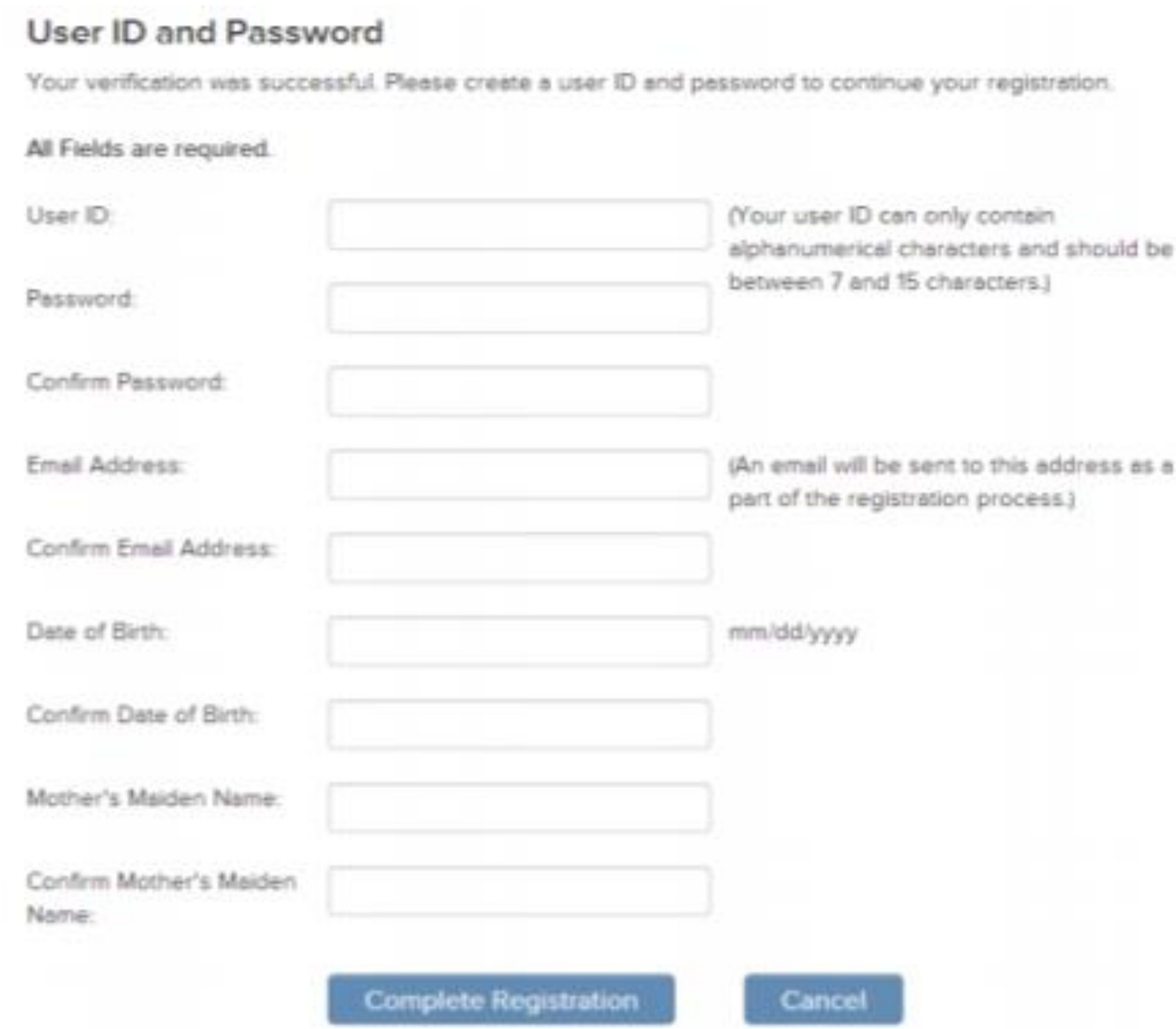
City:

State: Select State

Zip:

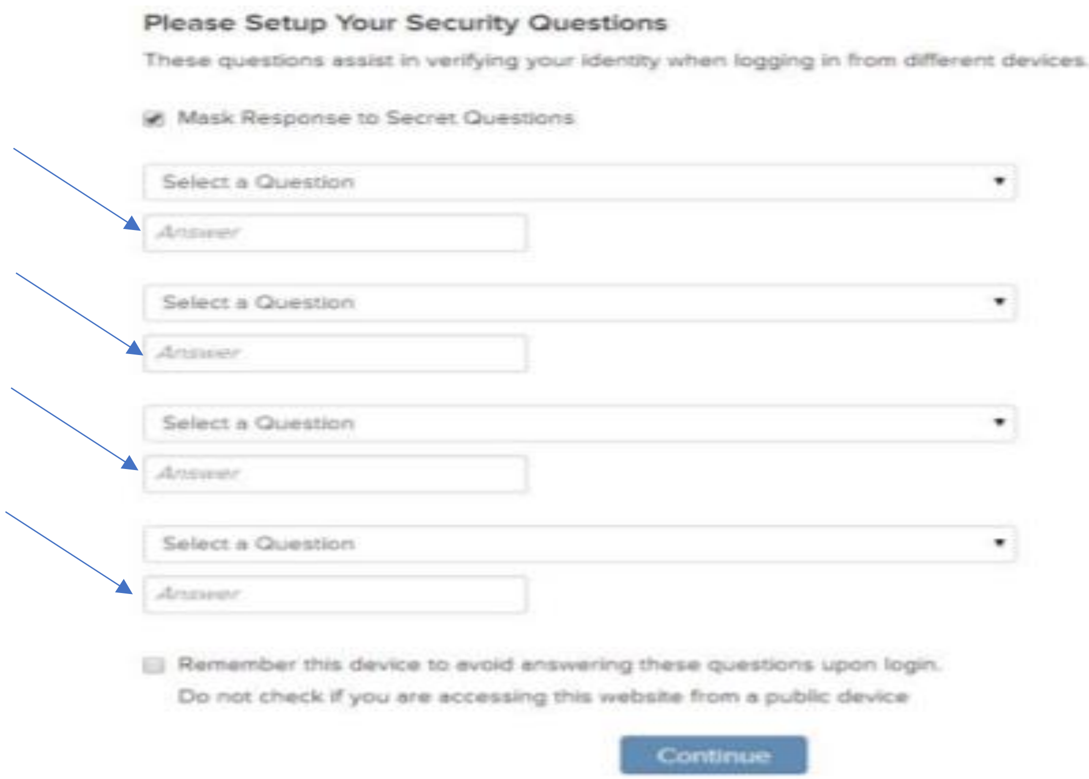
Continue Cancel

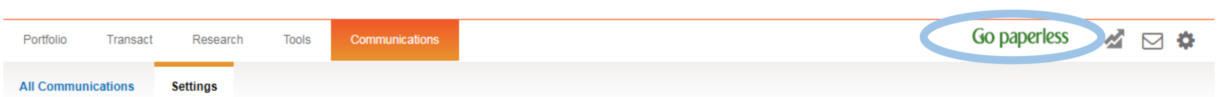
Once the security questions are answered, you will be sent to the page titled 'User ID and Password'. After the fields are completed, please click on the 'Complete Registration' box.



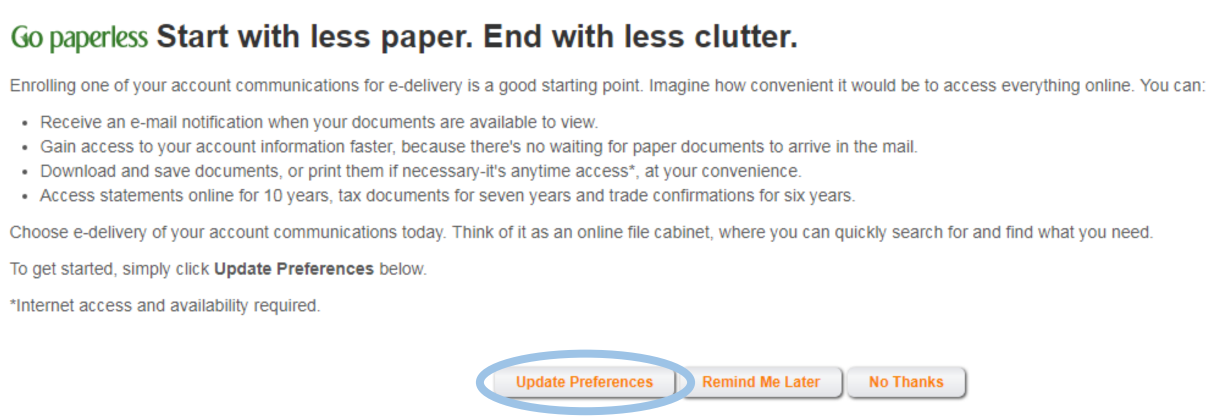
After you compete the registration, you will receive an email that confirms your registration. Please click on the link labeled 'click here' which will redirect you to a new page to login. If the login asks for the financial organization #, please type '3Z1'.

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





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



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[1] (Included)
	Quarterly Performance Reports[1, 2] (Included)
	Prospectus[1] (Included)
	Proxy/Shareholder Communications

1 - 1 of 1 results « ‹ 1 › »

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

[1] Available communication types are subject to change.

[2] 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.