NetXInvestor

Steps for Self-Registration

Use the address below as confirmed by your advisor to access NetXInvestor.

- www.raaview.com for Royal Alliance
- www.fscview.com for FSC Securities Corporation
- www.spfview.com for SagePoint Financial
- www.wfsview.com for Woodbury Financial Services

1. Log into **NetXInvestor** using the appropriate URL confirmed by your advisor.
2. Click **Register**.
3. Review the **Welcome Screen** and then Click **Start Registration**.
4. Review the terms and conditions regarding identity verification and click **I Agree**.
5. Provide information, including your name, a valid email address, Social Security number, legal U.S. address, and account number on which you are listed as the primary account holder.
6. Verify your identity and proceed.
   To verify your identity and for the safety and security of your information, you will be asked three questions.
   - If you provide the correct answer to all three questions, you will be taken to the next step.
   - If you fail to provide the correct answer for one question, the fourth question will be displayed. If your answer to the fourth question is correct, you will be taken to the next step.
   - If you fail to provide the correct answer for more than two questions, a message displays indicating you have failed to verify your identity. You can either try again later or contact your broker-dealer for assistance.
7. From the Userid and Password screen, Create a **user ID and password,** enter **email address**, **date of birth** and **mother's maiden name**.

   NOTE: An email with further instructions is sent to the entered email address. **Action should be taken in three days of receiving the email.**
8. Click the link in the email within three days to make your **user ID** permanent. The next step in the process is to log in and complete additional security features which include setting up a One Time Passcode (OTP) and security image.

Completing the OTP (One Time Passcode)

Once you login for the first time you will be taken through the process to set up your OTP code. This is an extra layer of security with the login process when the NetX Investor website doesn't recognize the computer or device you are using. An OTP code will be sent to either your email or phone based on the choice you select during the setup process.

Note1: You must complete either the Phone or Email section. You are not required to complete both.

Note2: If your web browser has auto-filled any fields (such as email address or phone number) on this section please remove and retype the information as the system may not validate prefilled data.

1. Complete the section for **"Add a phone number"**, Select contact method.
2. **Check the box** to have the system remember your computer
3. **Click Continue.**
4. When you receive the code, **Enter** the **Code** in the spaces provided on the "Activate your device" screen.
5. **Click Activate**.
6. **Click Close** on the confirmation prompt indicating your phone has been activated.
7. Now you need to select your security image, **Click Select** from the Security set up screen.
8. **Select** your desired **image**.
9. **Enter** a name or phrase for your selected image.
10. **Click Continue**.
11. **Review**/**Confirm** your selection, then **Click Continue. Click No Thanks** to continue to NetXInvestor if you are not ready to set up statements for eDelivery.

eDelivery Note: You can choose to *Update Preferences, Remind Me Later or No Thanks*. Please refer to page 24 for instructions on setting up your statements for eDelivery.

eDelivery

You can enable electronic delivery of statements and documents to be delivered to your email address (es). You can also view the statements and documents online in the NetXInvestor platform.

The first step in the eDelivery process is to set up your email address (es) that you wish to have statements sent.

Steps to set up email addresses

1. Access Settings by clicking on one of the Settings icon in NetXInvestor
2. In the **Email Address(es)** section, click the **Add Email Address(es)** link. The **Add New Email Address** window displays.
3. In the **Email Address 1** and **Confirm Email Address 1** fields, type the **primary email address**.
4. In the **Email Address 2** and **Confirm Email Address 2** fields, type the **secondary email address**.
5. Click the **Save button**.

eDelivery process for Individual accounts

1. **Click Go Paperless** from Home Page.
2. In the e-Delivery Preferences section, **Click** the **Edit** link. The Document Delivery Preferences window displays.
3. **Select** the box (es) next to the documents against the respective account you want to opt for e-delivery. **Tip:** To view the included documents under a category, click the Documents Included link. From the email list, select the required email address to which the documents should be delivered electronically.
4. **Click** the **Save** button. A window displays the terms & conditions.
5. Read through the T**erms and Conditions** and **Click** the **I Agree** button. A window displays stating the e-delivery preferences have been saved.
6. **Click** the **OK** button to continue.

eDelivery process for Multiple Accounts

1. **Click Go Paperless** from the Home Page.
2. In the **e-Delivery Preferences** section, **Click** the **Quick Enroll (for all accounts)** link. The **Document Delivery Preferences** window displays.
3. **Select the box (es**) next to the documents you want to opt for e-delivery.
4. From the email list**, Select** the **required email address** to which the documents should be delivered electronically.
5. **Click** the **Save** button. A window displays the terms and conditions.
6. Read through the **Terms and Conditions** and **Click** the **I Agree** button. A window displays stating the e-delivery preferences have been saved.
7. **Click** the **OK** button to continue.