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| 1. From your ***Accounts*** Navigation bar (on the left), select |
| 1. In the ***Add Account*** dialog box, select ***Brokerage*** under the ***Investing*** category then click ***Next***      1. In the ***Add Brokerage Account*** dialog box, enter “NetExchange” in the entry field, then select “NetExchange Client” from the list and click ***Next***. |
| |  | | --- | | 1. In the ***Customer ID*** field, enter HWA followed by your NetXInvestor login ID. For example: HWABROKERAGEOPS | | 1. In the ***Pin*** field, enter your password for NetXInvestor and click the ***Connect*** button to continue. | | 1. Verify the account information, select ***Add*** and create an account Nickname for easy identification. Click the ***Next*** button to begin the download into Quicken. 2. Once the download has completed click **Finish** to review the downloaded transactions      1. Select either ***Review First*** to review all transactions before accepting them or ***Accept All*** to accept all transactions as is into the Quicken account.      1. If you have selected to review first, examine the transactions at the bottom of the screen and select ***Accept*** if you wish to move them into your Quicken account.      1. As the transactions are accepted, they will begin to show at the top of the screen in the Quicken account. | |

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| **Having Trouble?** |
| Please call our office at 408-963-2874 or  Email Fatima Franco at [ffranco@wradvisors.com](mailto:ffranco@wradvisors.com) |