

# NetXInvestor

## Registration and Setup Guide



### OVERVIEW

NetXInvestor is a platform for users to view their Pershing accounts and review account statements online. This user guide will provide instructions for the key categories below for using the platform. *(Click hyperlink to jump to section)*

- [Self-Registration Instructions](#)
- [Enroll In E-Delivery](#)
- [Linking Additional Accounts](#)
- [Forgot/Reset Password](#)

To access NetXInvestor, use the Voya branded URL web address below:

- [myvovaira.voya.com](http://myvovaira.voya.com)

**Note:** Both sites are the same platform, however, when using [www.netxinvestor.com](http://www.netxinvestor.com) please type **3Z1** in the financial Org# box located above the user ID box.

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## SELF-REGISTRATION INSTRUCTIONS

### OVERVIEW

This is an overview of how to online self-registration for NetXInvestor for the following registration types:

- Retirement Accounts
- Individual Accounts
- Joint Accounts (where the primary owner is the one registering for access)

### SUPPORTED BROWSERS

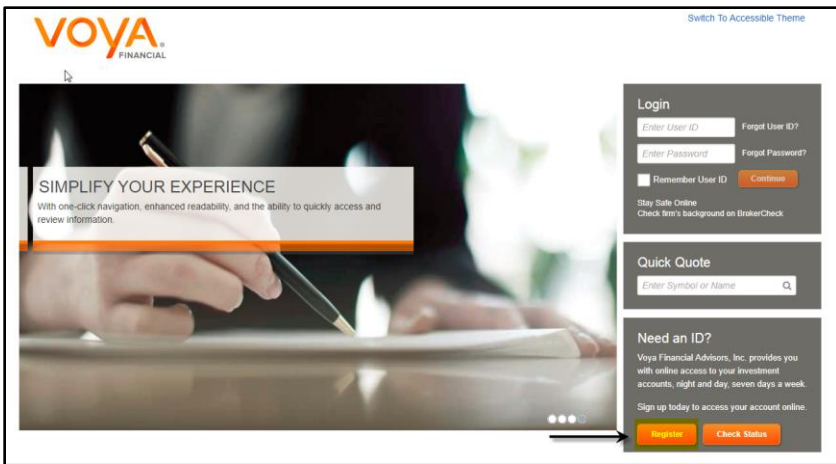
- **Windows browsers:** Microsoft® Internet Explorer 11 and higher, Google Chrome™ Version 52.x and higher and Mozilla® Firefox® Version 48.x and higher
- **Mac OS X 10.5+ browsers:** Apple® Safari Version 6.x and higher
- **Mac OS X 10.6+ browsers:** Google Chrome Version 52.x and higher, Mozilla® Firefox® Version 48.x and higher and Apple® Safari Version 6.x and higher
- **Apple® iOS 7+ browsers:** Apple® Safari Version 6.x and higher
- **Android browsers:** Google Chrome Version 52.x and higher

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### STEP 1

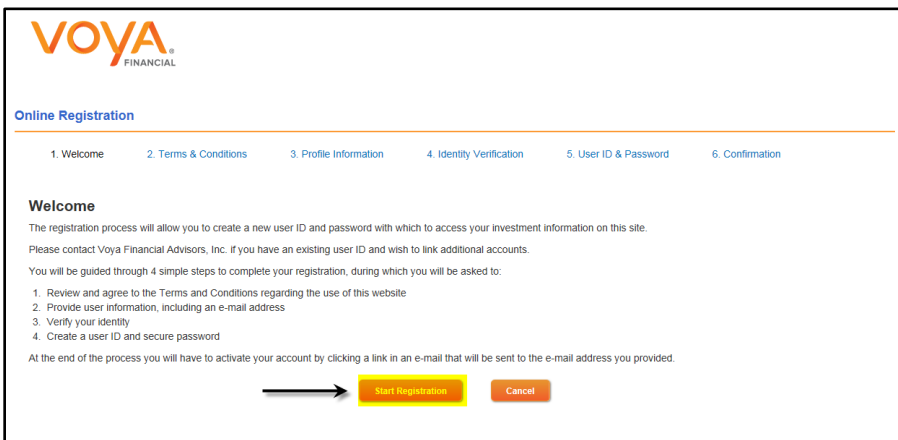
Go to: [myvovaira.voya.com](http://myvovaira.voya.com) link and click **Register**.

**Note:** If using the NetXInvestor.com site, you will be asked to enter the 1<sup>st</sup> three digits of your account number. Please use the [myvovaira.voya.com](http://myvovaira.voya.com) link as it will not require you to enter this information.



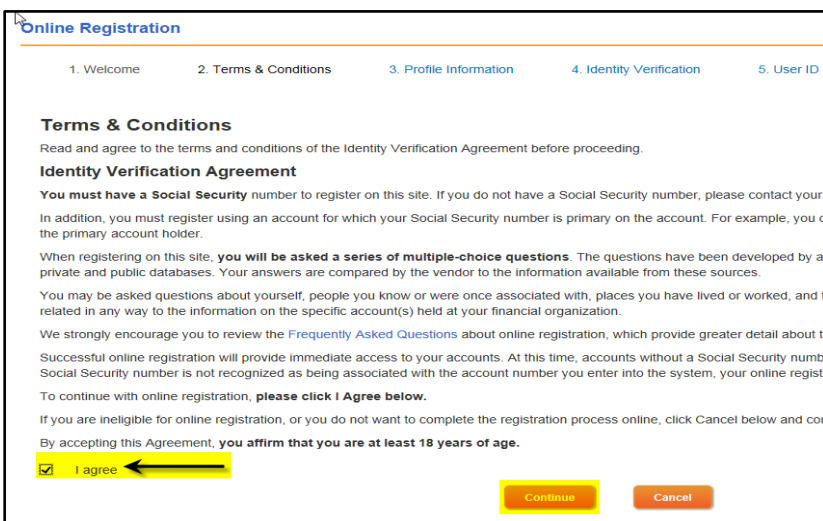
## STEP 2

Review the Welcome Screen and click **Start Registration**.



## STEP 3

Review the terms and conditions regarding identity verification and check **I Agree**, then click **Continue**



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## STEP 4

Provide user 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. Please note that all fields are required.

The screenshot shows the 'Online Registration' interface at step 4, 'Identity Verification'. The page title is 'Online Registration' and the progress bar indicates steps: 1. Welcome, 2. Terms & Conditions, 3. Profile Information, and 4. Identity Verification. The main heading is 'User Information'. Below it, there is a note: 'Provide the following information, which will be used to authenticate your identity. This service is provided by a third party. Your credit rating.' and a warning: 'Please do not click the "Back" button in your browser during the registration process.' A yellow highlight box contains the text 'All fields are required.' The form fields include: 'First Name:', 'Last Name:', 'Social Security Number:', 'Account Number:' (with a note 'Please enter an account number for verification'), 'Legal Address: (U.S. address only)' (with three stacked input boxes), 'City:', 'State:' (with a dropdown menu showing 'Select State'), and 'Zip:'. At the bottom right, there are two buttons: 'Continue' (highlighted in yellow) and 'Cancel'. An arrow points to the 'Continue' button.

## STEP 5

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 try again later to complete the identity verification steps.

## STEP 6

Create a **Temporary User ID** and **Password**

Enter **Email Address**, **Date of Birth** and **Mother's Maiden Name**

## STEP 7

An email with further instructions is sent to the entered email address. Action should be taken within **Three Days** of receiving the email. Click the link in the email within **Three Days** to make the user ID permanent.

Create personalized security questions when prompted.

The self-registration for online access is complete.

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## ENROLL IN E-DELIVERY

### OVERVIEW

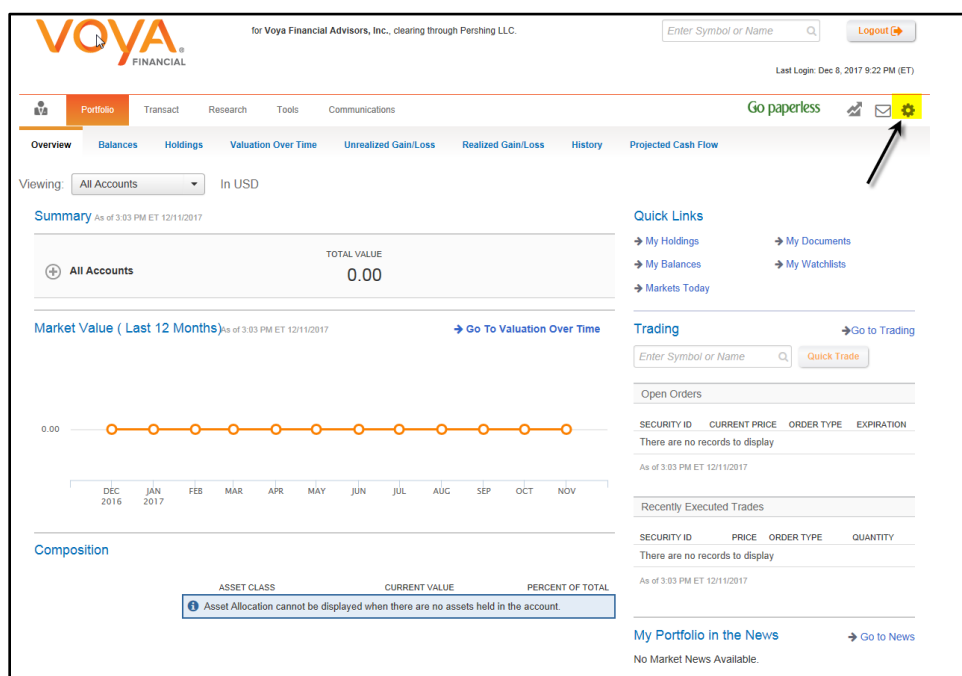
E-Delivery allows statements, reports, trade confirmations, and tax documents to be sent electronically to the registered email address. This allows users to receive information quickly in an electronic format. The steps below will guide users to setting up this feature.

### STEP 1

Go to: [myvoyaira.voya.com](http://myvoyaira.voya.com) and log into your account.

### STEP 2

Upon signing in, select the profile settings in the upper right corner of your screen.

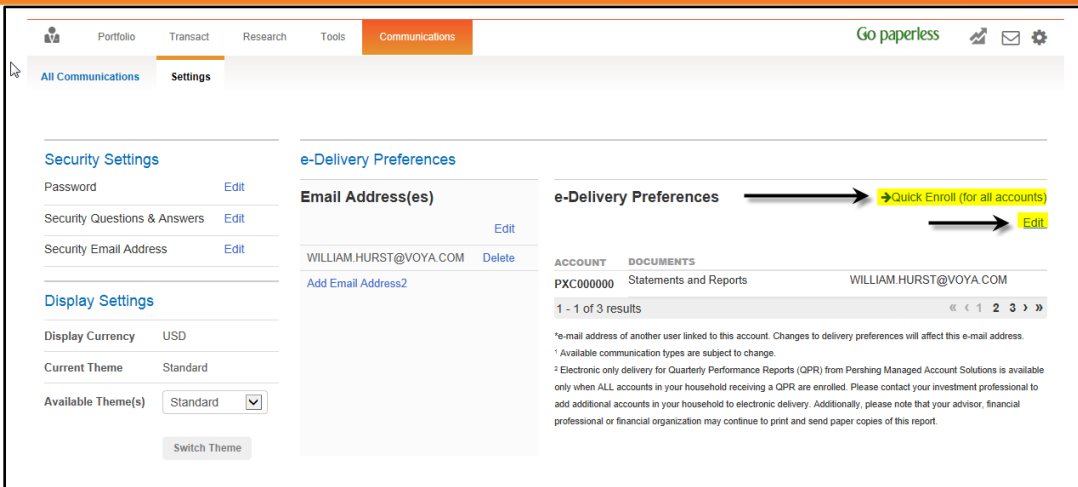


The screenshot displays the VOYA Financial account dashboard. At the top right, there is a search bar, a 'Logout' button, and a 'Last Login' timestamp. Below this is a navigation bar with 'Go paperless' and a settings gear icon. The main content area includes a 'Summary' section with 'All Accounts' and a 'TOTAL VALUE' of 0.00. A 'Market Value' chart shows data from Dec 2016 to Nov 2017. The 'Composition' section at the bottom has a message: 'Asset Allocation cannot be displayed when there are no assets held in the account.' On the right side, there are sections for 'Quick Links', 'Trading', 'Open Orders', and 'Recently Executed Trades', all showing 'There are no records to display'.

### STEP 3

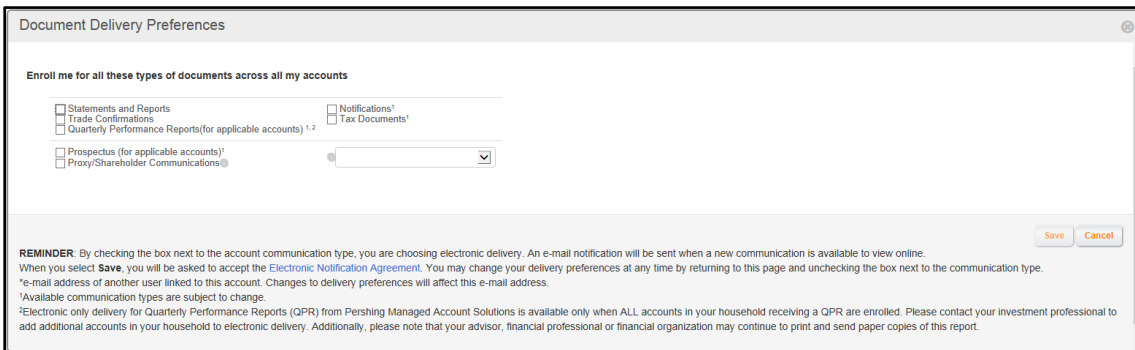
To set up all accounts for e-Delivery click **Quick Enroll**.

To set up accounts individually click **Edit**.

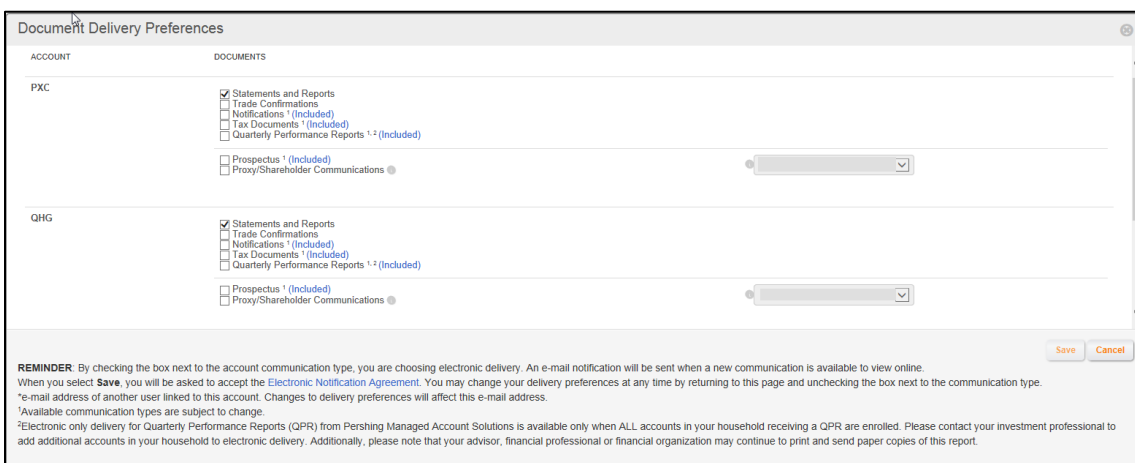


## STEP 4

Select the boxes next to the documents to opt-in for e-Delivery.  
If **Quick Enroll** was selected all accounts will opt-in



If **Edit** was selected, selections will need to be made by each account listed on this screen



## STEP 5

Click **Save**. A window displays the terms and conditions. Read through the terms and conditions and click **I Agree**. A window displays stating the e-delivery preferences have been saved. Click **OK** to continue.

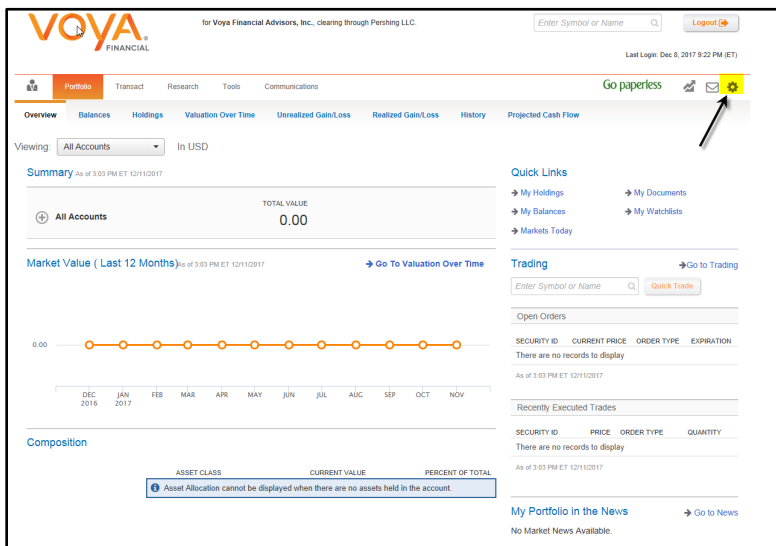
## LINKING ADDITIONAL ACCOUNTS

### OVERVIEW

Account linking enables you to link all accounts which have the same Social Security number as yours. Through account linking, you can access all your account information from one place. You can link account (s) only if you had created your user ID via online self-registration.

### STEP 1

On the [myvoyaira.voya.com](http://myvoyaira.voya.com) NetXInvestor home page, click **Settings**.



### STEP 2

In the **Account Linking** section, select the account to link by clicking on the check box and click **submit**.

#### Account Linking

We have detected that you have access to the following accounts. You can link any or all of these accounts to this user id.

ACCOUNT	MAILING ADDRESS
<input type="checkbox"/>	1 MAIN STREET ANY TOWN, NJ 00000

## FORGOT/RESET PASSWORD

### OVERVIEW

NetXInvestor is enabled for users to reset their password directly through the website. The following guide will outline the steps for online access users to do password resets on the NetXInvestor platform.

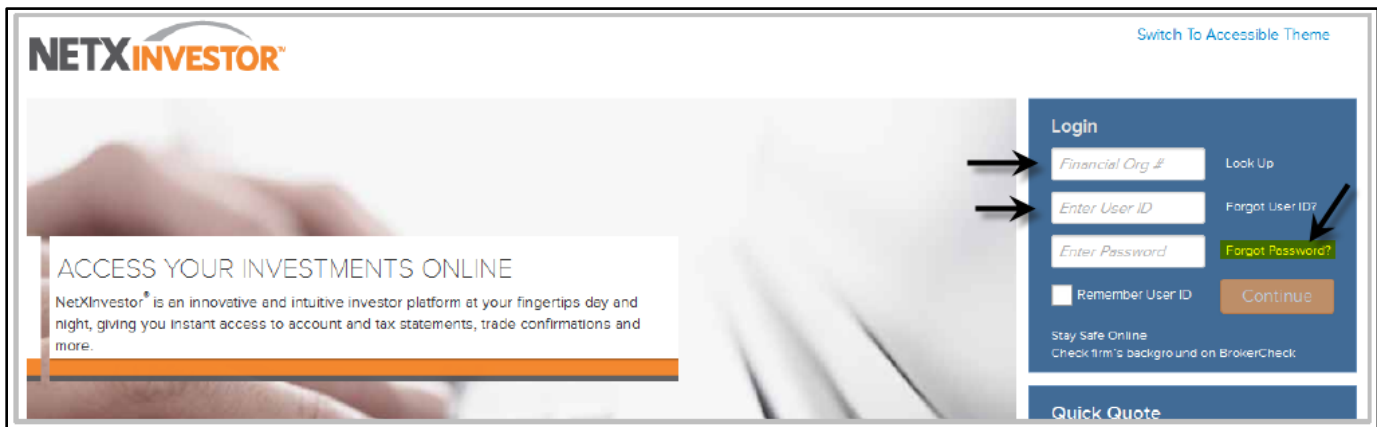
#### Please Note:

If using the [netxinvestor.com](http://netxinvestor.com) link, please type **3Z1** in the Financial Org # box located above the user ID box.

After one failed attempt, please use the FORGOT/RESET PASSWORD instructions below to limit the chances of getting locked out. The system will restrict a user's access after three failed attempts to log in. At this time a call will need to be made to the Voya Financial Advisors Resource Center to have the user ID unlocked.

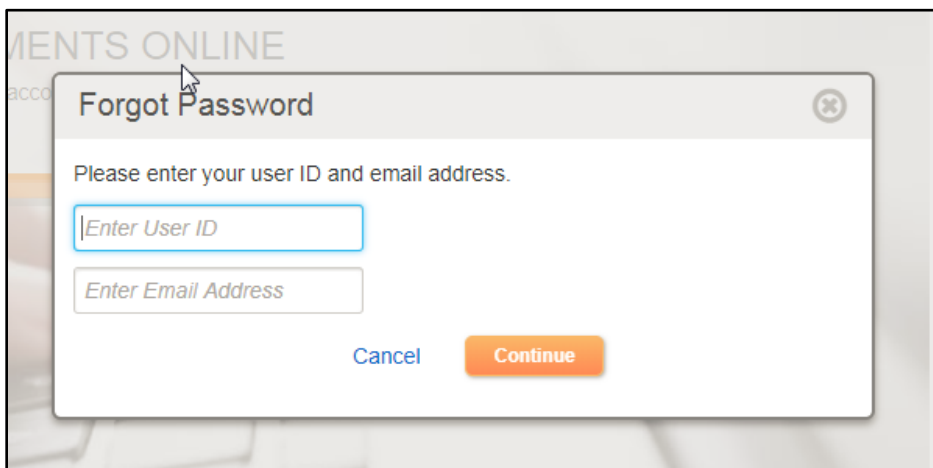
### STEP 1

On the [myvovaira.voya.com](http://myvovaira.voya.com) home page click **Forgot Password**.



### STEP 2

After clicking **Forgot Password**, a screen will display to enter user ID and registered email address.



### STEP 3

After completing verification in step 2 you will be prompted to answer challenge questions to reset your password. After completion, click **Continue**.

**Note :** The system will restrict a user's access after three failed attempts to answer the security questions. At this time a call will need to be made to the Voya Financial Advisors Resource Center to have the user ID unlocked.

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#### Security Questions

1 For your security please answer your personal questions.

What was the make and model of your first car? (Ex. Ford Mustang)

Hide Responses

What is your favorite book?

What is your favorite movie?

#### Remember My Device

2 Would you like to access your accounts from this device in the future without the need to answer a security question?

Check "No" if you are using a public device

Yes  No

**NOTE:** Your device will be remembered for 120 days

Cancel Continue

### STEP 4

On the next screen enter a new password and confirm the new password in the fields and click **Continue**. Please note the requirement below for the new password. (Also found to the right of the screen).

- Cannot contain VOYA FINANCIAL ADVISORS, INC. ID
- Must contain a minimum of 8 and a maximum of 12 characters
- Cannot contain any special characters. For example, AA-BB-CC
- Must contain at least one alpha and one numeric character. For example, 1redcar2
- Cannot contain your first, last or middle name

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#### Reset Password

Enter a new password using the Password Rules.

**New Password**

**Confirm New Password**

To create an acceptable password your password must :

1. not contain VOYA FINANCIAL ADVISORS, INC. ID
2. contain a minimum of 8 and a maximum of 12 characters
3. not contain any special characters. For example, AA-BB-CC
4. contain at least one alpha and one numeric character. For example, 1redcar2
5. not contain your first, last or middle name

Cancel Continue

### WHO DO I CONTACT WITH QUESTIONS?

Your financial advisor or your Voya Financial Advisor's Resource Center at (800)356-2906.