

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](#)
- [Update Email Address for E-Delivery](#)
- [Linking Additional Accounts](#)
- [Forgot/Reset Password](#)

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

- myvoyaira.voya.com

Please Note:

If going directly to netxinvestor.com please type 3Z1 in the financial Org# box located above the user ID box. If self-registering, you will be asked for the 1st three digits of your account number which will be located on your statement or by contacting your financial advisor.

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)

Please Note:

All screenshots provided are for the myvoyaira.voya.com link for the NetXInvestor site.

SUPPORTED BROWSERS

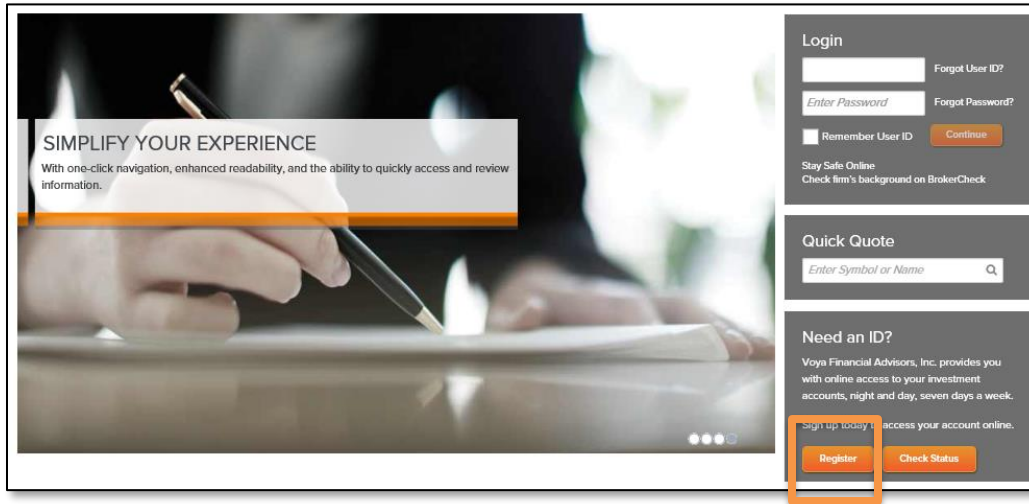
- **Windows browsers:** Microsoft® Internet Explorer 11 and higher, Google Chrome™ Version 52.x and higher and Mozilla® Firefox® Version 48.x and higher
 - **Mac OS X 10.5+ browsers:** Apple® Safari Version 6.x and higher
 - **Mac OS X 10.6+ browsers:** Google Chrome Version 52.x and higher, Mozilla®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

STEP 1

Go to: myvoyaira.voya.com link and click **Register**

Please Note:

If going directly to NetXInvestor.com you will be asked to enter the 1st three digits of your account number. Please use the preferred myvoyaira interface link above.

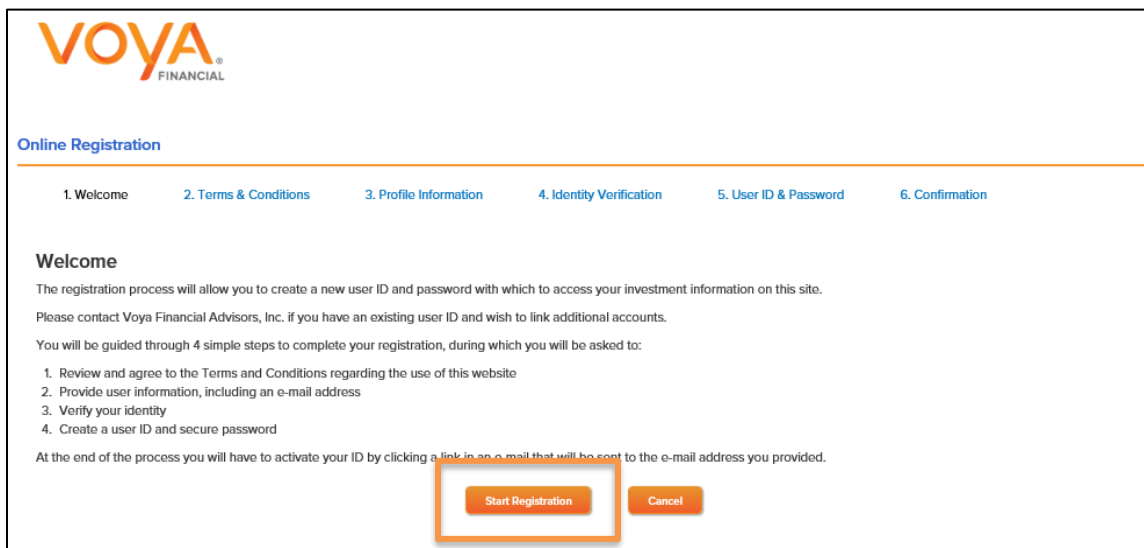


STEP 2

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

Please Note:

If using the NetXInvestor.com site, you will be asked to enter the 1st three digits of your account number. Please use the myvoyaira.voya.com link as it will not require you to enter this information.



STEP 3

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

Online Registration

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

Terms & Conditions

Read and agree to the terms and conditions of the Identity Verification Agreement before proceeding.

Identity Verification Agreement

You must have a **Social Security** number to register on this site. If you do not have a Social Security number, please contact your financial organization for assistance.

In addition, you must register using an account for which your Social Security number is primary on the account. For example, you cannot register using a joint account if you are not listed as the primary account holder.

When registering on this site, **you will be asked a series of multiple-choice questions**. The questions have been developed by a third-party vendor based on information obtained from private and public databases. Your answers are compared by the vendor to the information available from these sources.

You may be asked questions about yourself, people you know or were once associated with, places you have lived or worked, and the like. The information used in these questions is not related in any way to the information on the specific account(s) held at your financial organization.

We strongly encourage you to review the [Frequently Asked Questions](#) about online registration, which provide greater detail about the identity verification process.

Successful online registration will provide immediate access to your accounts. At this time, accounts without a Social Security number are not eligible for online registration. In addition, if your Social Security number is not recognized as being associated with the account number you enter into the system, your online registration will be unsuccessful.

To continue with online registration, **please click I Agree below**.

If you are ineligible for online registration, or you do not want to complete the registration process online, click Cancel below and contact your financial organization to register.

By accepting this Agreement, you affirm that you are at least 18 years of age.

I agree

Continue Cancel

STEP 4

Provide user information, including your **Name**, **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. Dashes should not be used when entering Social Security Number or Account Number.

Online Registration

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

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

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 three questions, a message displays indicating you have failed to verify your identity. You can try again to complete the identity verification steps. If the system does not allow you to try again you can try to use a different browser or clear your cache and cookies.

STEP 6

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

Please note the requirements below for the password

- Cannot contain VOYA FINANCIAL ADVISORS, INC
- Must contain a minimum of 8 and a maximum of 32 characters
- Special characters may be used. For example, #@\$!&*
- Must contain at least one alpha and one numeric character. For example, 1redcar2
- Must contain at least one upper case and one lower case letter
- Cannot contain your first, last or middle name

Enter **Email Address**, **Date of Birth (xx/xx/xxxx format)** 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 by clicking the link that says "click here to complete the registration"

You may also be prompted to enter or select an email address. Enter the same email address from step #6

Create personalized security questions when prompted. You can uncheck the box "Mask Response to Security Questions" to confirm you have typed the answers correctly.

After setting up the personalized security questions, the system will ask if you want to go paperless.

- If you have more than one account and want to set up all accounts at the same time click on "remind me later"
- Click the gear wheel in the upper right corner to go to the settings page and link other accounts
- Click quick enroll on the settings page to enroll all accounts

The self-registration for online access is complete.

ENROLL IN E-DELIVERY

OVERVIEW

eDelivery allows users to view statements, reports, trade confirmations, and tax documents quickly in an electronic format. The steps below will guide users to setting up this feature.

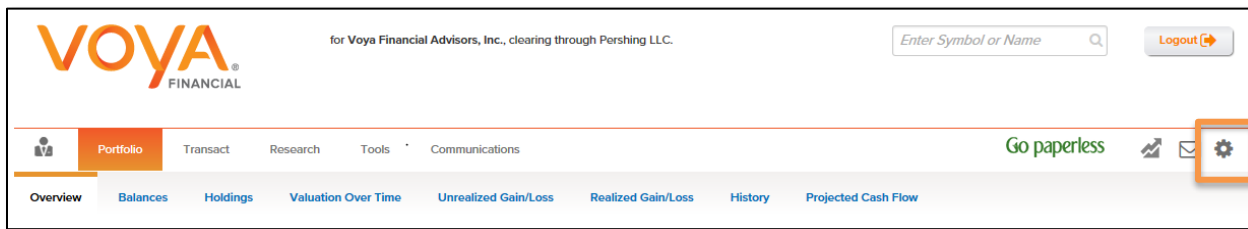
Special Note: If you elect to receive Proxy/Shareholder Communications via eDelivery, the system will prompt you to establish a 4 digit pin. These documents are emailed to you and you will need to use the PIN to unlock the attachment. The documents will not be available to view online.

STEP 1

Go to: myvoyaira.voya.com and log into your account

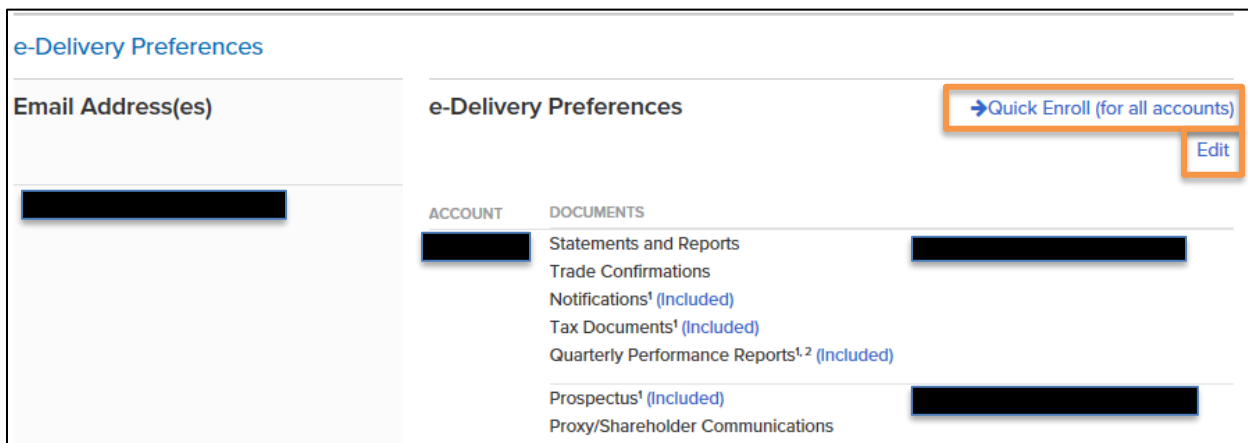
STEP 2

Upon signing in, select the profile settings (gear wheel) in the upper right corner of your screen



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.

The screenshot shows the 'e-Delivery Preferences' window. At the top, it says 'Enroll me for all these types of documents across all my accounts'. Below this, there are several checkboxes, all of which are checked: 'Select All', 'Statements and Reports', 'Trade Confirmations', 'Quarterly Performance Reports (for applicable accounts) 1,2', 'Notifications 1', and 'Tax Documents 1'. Below these, there is a section titled 'Please select an Email Address to receive the eDelivery items below.' with two checkboxes: 'Prospectus (for applicable accounts) 1' and 'Proxy/Shareholder Communications'. At the bottom right, there are 'Cancel' and 'Save' buttons.

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

The screenshot shows the 'e-Delivery Preferences' window in 'Edit' mode. It has a table with two columns: 'ACCOUNT' and 'DOCUMENTS'. There are two rows of accounts. The first row has a checked box for 'Statements and Reports', 'Trade Confirmations', 'Notifications 1 (Included)', 'Tax Documents 1 (Included)', and 'Quarterly Performance Reports 1,2 (Included)'. The second row has checked boxes for 'Prospectus 1 (Included)' and 'Proxy/Shareholder Communications', and a 'Change PIN' button next to 'Existing PIN number: ****'. At the bottom right, there are 'Save' and 'Cancel' buttons.

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

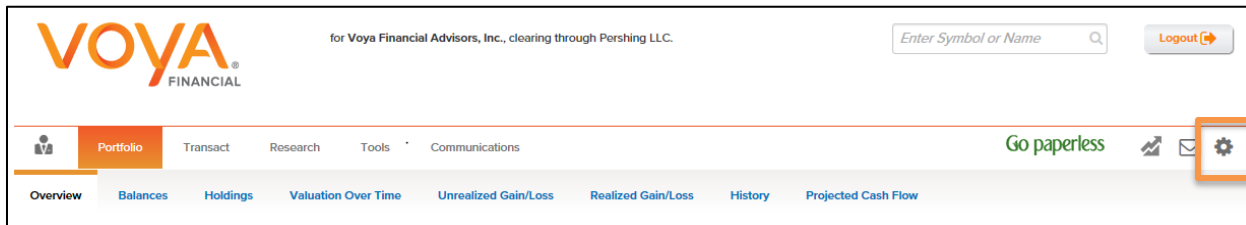
UPDATE EMAIL ADDRESS FOR E-DELIVERY

STEP 1

Go to: myvoyaira.voya.com and log into your account

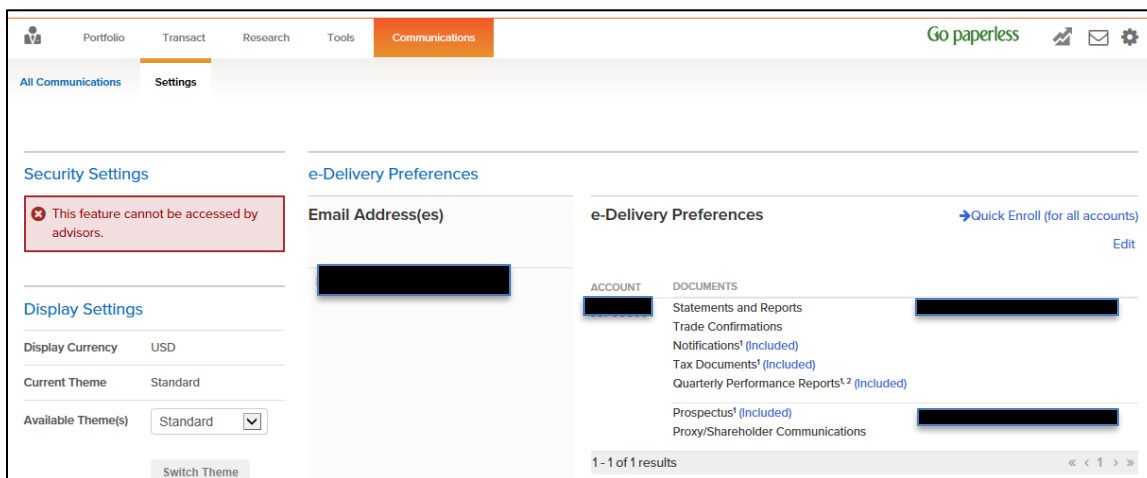
STEP 2

Click on settings (gear wheel) in the upper right corner of the screen



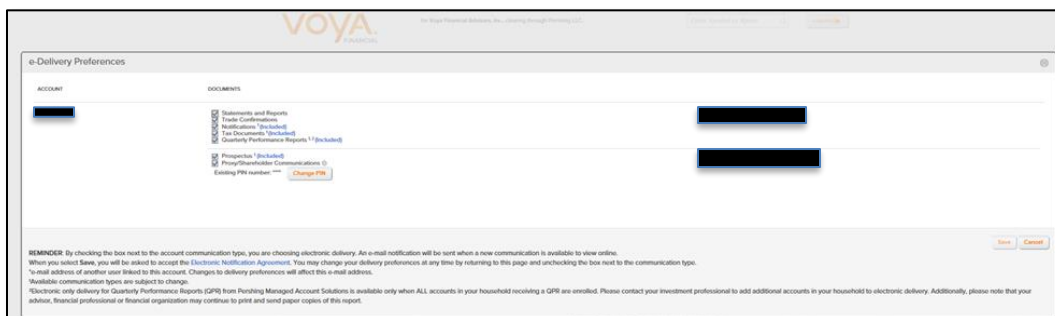
STEP 3

Update the email address under the e-Delivery Preferences – Email Address section



STEP 4

After adding / editing the email address, click on either Quick Enroll (if multiple accounts) or Edit (for an individual account then, if the email address is not showing in the box to the right, use the drop down arrow to select the email address to user for eDelivery.



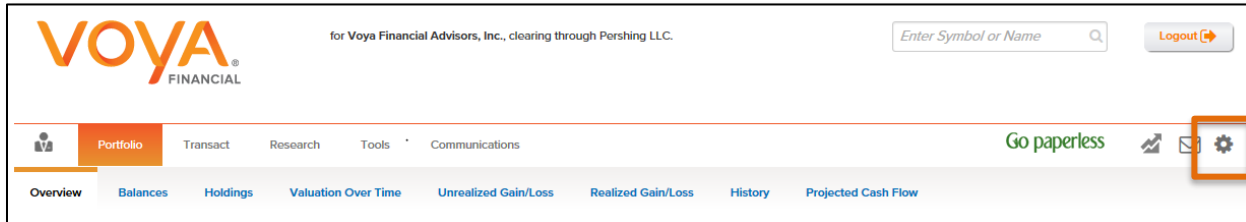
LINKING ADDITIONAL ACCOUNTS

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.

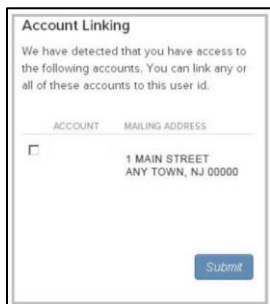
STEP 1

On the myvoyaira.voya.com NetXInvestor home page, click **Settings** (gear wheel).



STEP 2

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



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.

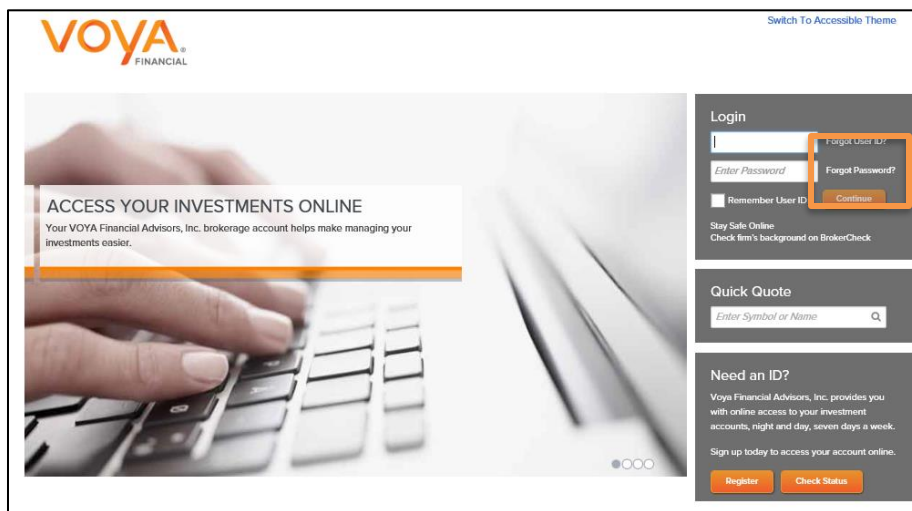
Please Note:

If using the netxinvestor.com 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 home page click **Forgot Password**. Please note that the Forgot Password link is not available via mobile device.



STEP 2

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

A screenshot of the "Forgot Password" form. The form has a title "Forgot Password" and a close button. Below the title is the instruction "Please enter your user ID and email address." There are two input fields: "Enter User ID" and "Enter Email Address". At the bottom of the form are two buttons: "Cancel" and "Continue".

STEP 3

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

Please 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.

VOYA
FINANCIAL

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 32 characters
- Special characters may be used. For example, #@\$!&*
- Must contain at least one alpha and one numeric character. For example, 1redcar2
- Must contain at least one upper and one lower case letter
- Cannot contain your first, last or middle name

WHO DO I CONTACT WITH QUESTIONS?

Your financial advisor or your Voya Financial Advisors Resource Center at (800)356-2906

CN 919998_0821

Product and service offered through the Voya family of Companies