

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:

- 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

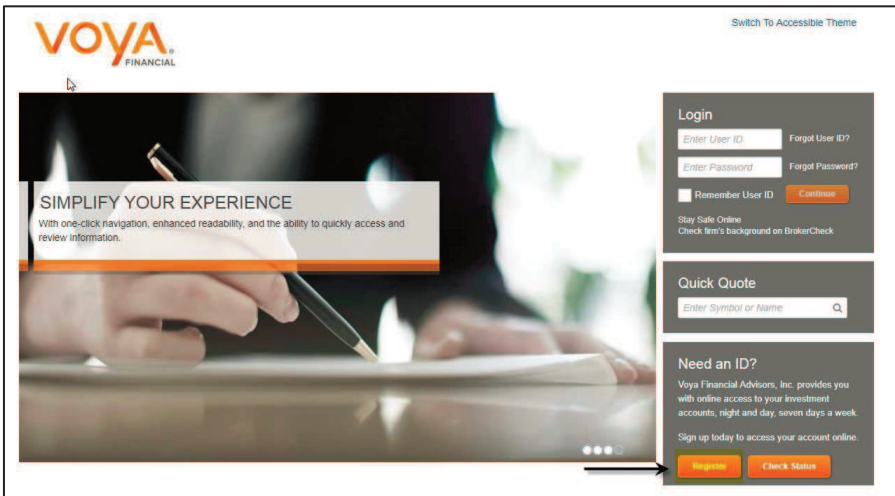
- **Windows browsers:** Microsoft® Internet Explorer 11 and higher, Google Chrome™ Version 52.x and higher and Mozilla® Firefox® Version 48.x and higher
 - **Mac OS X 10.5+ browsers:** Apple® Safari Version 6.x and higher
 - **Mac OS X 10.6+ browsers:** Google Chrome Version 52.x and higher, Mozilla®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

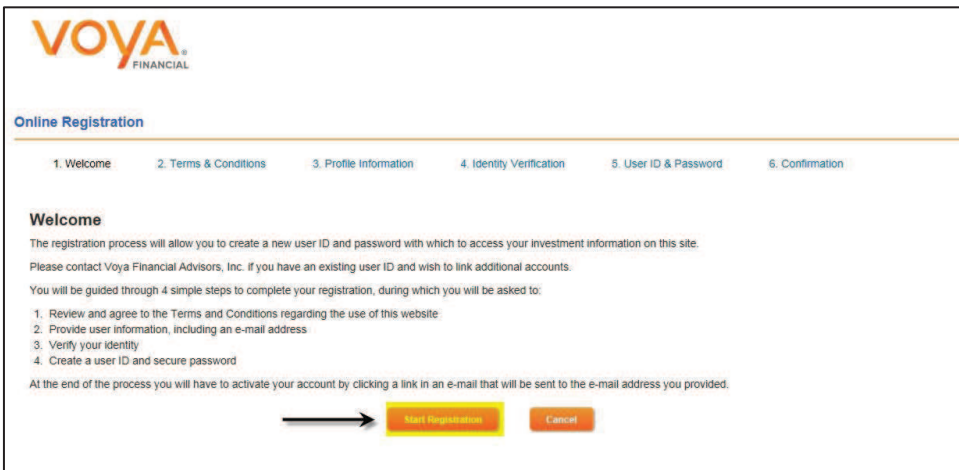


STEP 2

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**

The screenshot shows the 'Online Registration' page at step 2, 'Terms & Conditions'. The progress bar at the top indicates the current step. The main heading is 'Terms & Conditions', followed by a sub-heading 'Identity Verification Agreement'. The text explains the requirements for registration, including the need for a Social Security number and the agreement to answer multiple-choice questions for identity verification. At the bottom, there is a checkbox labeled 'I agree' which is checked, and a yellow arrow points to it. To the right of the checkbox are 'Continue' and 'Cancel' buttons.

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' page at step 3, 'Profile Information'. The progress bar at the top indicates the current step. The main heading is 'User Information'. The text asks for information used to authenticate identity. A yellow box highlights 'All fields are required'. Below this are several input fields: 'First Name', 'Last Name', 'Social Security Number', 'Account Number' (with a note 'Please enter an account number for v'), 'Legal Address (U.S. address only)' (with three stacked input boxes), 'City', 'State' (with a dropdown menu), and 'Zip'. At the bottom right, there is a yellow arrow pointing to the 'Continue' button, and a 'Cancel' button is next to it.

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.

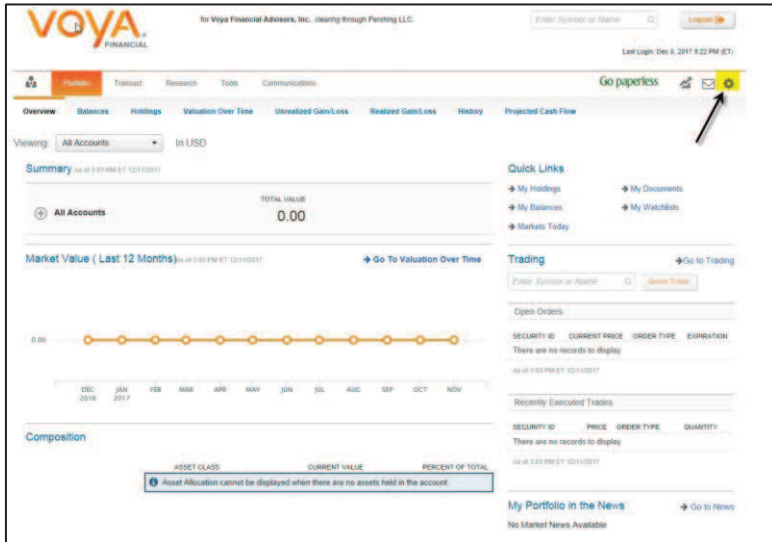
LINKING ADDITIONAL ACCOUNTS

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**.



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