



PENSINGER  
FINANCIAL, INC.

- *Client Access with*



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You will receive an email from SSG at the address you supplied with your account application. Click on the [www.netxclient.com](http://www.netxclient.com) address.

## SHAREHOLDERS SERVICE GROUP INC

04/16/2014

**Account ending in:** 156

Your notification is now available. Visit [www.netxclient.com](http://www.netxclient.com) or [www.myedocumentsuite.com](http://www.myedocumentsuite.com) to view, download or print your documents. Please have your user ID and password ready.

If you would like to stop receiving e-mail notifications and resume receiving paper copies of your account documents, you may log in to your account and change your document delivery preferences at any time. Please contact SHAREHOLDERS SERVICE GROUP INC if you have any questions.

Paperless account documents available through [www.netxclient.com](http://www.netxclient.com) or [www.myedocumentsuite.com](http://www.myedocumentsuite.com) are provided on behalf of SHAREHOLDERS SERVICE GROUP INC by Pershing LLC (member FINRA, NYSE, SIPC), a subsidiary of The Bank of New York Mellon Corporation.

Please add [edelivery@myedocumentsuite.com](mailto:edelivery@myedocumentsuite.com) to your address book to help ensure that you continue to receive e-mails from SHAREHOLDERS SERVICE GROUP INC.

This message is automatically generated. Please do not reply to this message.

Since this is your first attempt at logging in you will need to register first.  
Click on “Register”.



The screenshot displays the NetXInvestor website interface. On the left, a white text box with an orange border contains the heading "ACCESS YOUR INVESTMENTS ONLINE" and a paragraph: "NetXInvestor® is an innovative and intuitive investor platform at your fingertips day and night, giving you instant access to account and tax statements, trade confirmations and more." The background of the page is a blurred image of hands typing on a laptop keyboard. On the right side, there are three blue panels. The top panel is titled "Login" and contains a "Financial Org #" input field with a "Look up" link, a "User ID" input field, a "Remember me" checkbox, and an orange "Continue" button. The middle panel is titled "Quick Quote" and features a search input field labeled "Enter Symbol or Name" with a magnifying glass icon. The bottom panel is titled "Need an ID?" and contains the text: "NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week. Sign up today to access your account online." At the bottom of this panel, there are two buttons: "Register" and "Check Status". The "Register" button is circled in red.

In order to begin your registration you will need the first three characters of your account. We will supply you with your account number(s).



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

The registration process will allow you to create a new user ID and password with which to access your brokerage information on this site.

Please contact your financial organization if you have an existing user ID and wish to link additional accounts.

You will be guided through 4 simple steps to complete your registration, during which you will be asked to:

1. Review and agree to the Terms and Conditions regarding the use of this website
2. Provide user information, including an e-mail address
3. Verify your identity
4. Create a user ID and secure password

At the end of the process you will have to activate your account by clicking a link in an e-mail that will be sent to the e-mail address you provided.

We first need to determine if your financial organization offers online registration.

To do so, please enter the first three characters of your account number:

first three characters go here

# Complete the third party Identity Verification Agreement.



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

# Complete the User Information page.



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## 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:

Please enter your Social Security number using no dashes or spaces.

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:

Complete the User ID and Password page and answer the third party security questions that will follow after clicking on “Complete Registration.”



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### User ID and Password

Your verification was successful. Please create a user ID and password to continue your registration.

All Fields are required.

User ID:  (Your user ID can only contain alphanumerical characters and should be between 7 and 15 characters.)

Password:

Confirm Password:

Email Address:  (An email will be sent to this address as a part of the registration process.)

Confirm Email Address:

Date of Birth:  mm/dd/yyyy

Confirm Date of Birth:

Mother's Maiden Name:

Confirm Mother's Maiden Name:

To create an acceptable password your password should:

1. not contain SHAREHOLDERS SERVICE GROUP 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

After completing the third party Identity Verification Agreement you will see the Confirmation page; it will inform you that you will receive an email to complete your registration. You must click on the link in the email in order to complete your registration and gain access to your accounts. Typically the email takes several minutes before showing up in your inbox.



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### Confirmation



Your user ID has been created successfully. A confirmation email has been sent to your email address. You must click the link contained within the email to complete your registration within 3 calendar days. Failure to do so will result in termination of your User ID and re-enrollment will be necessary.

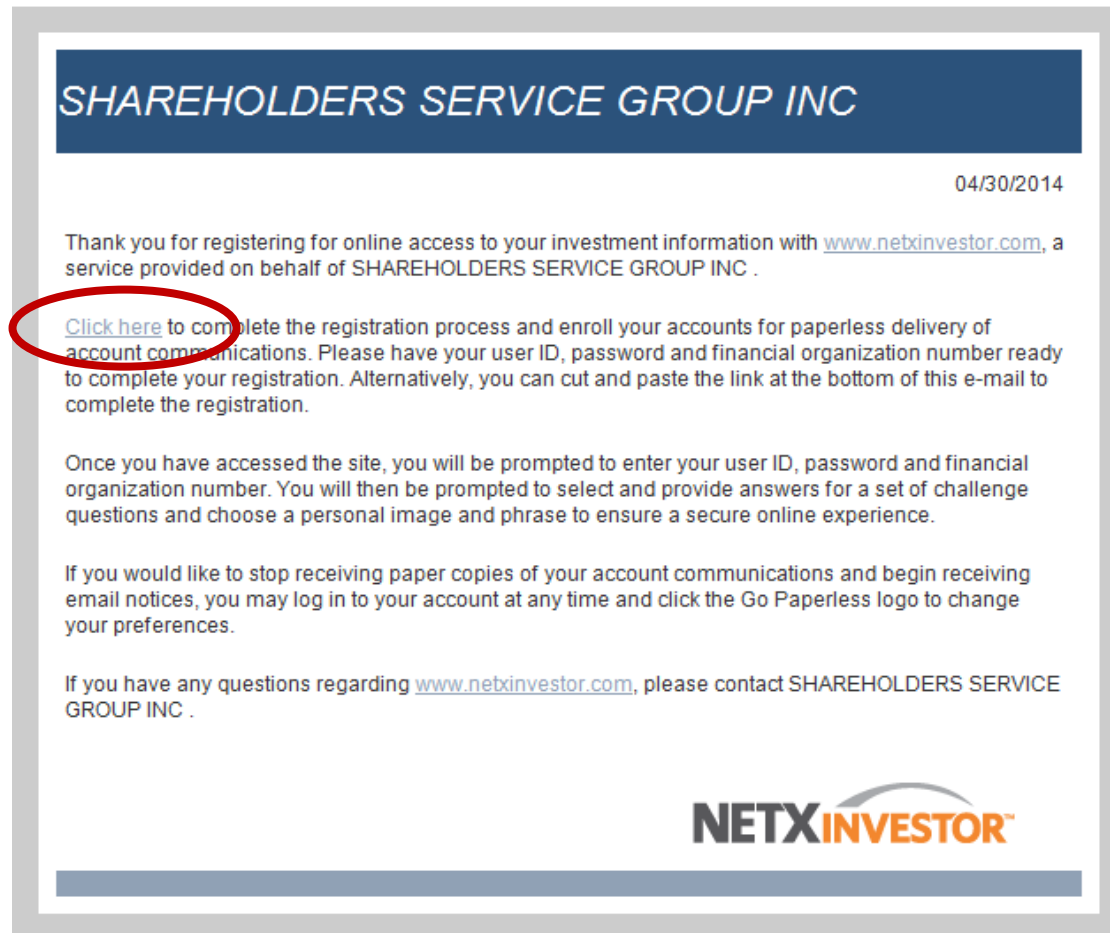
Please print this page or write down your user ID and keep it in a secure place. You will need your user ID to access your documents.

User ID:  
Email Address:

[Return to our Homepage](#)



The confirmation email from SSG will look like this. Click on “Click Here” to complete the registration process.

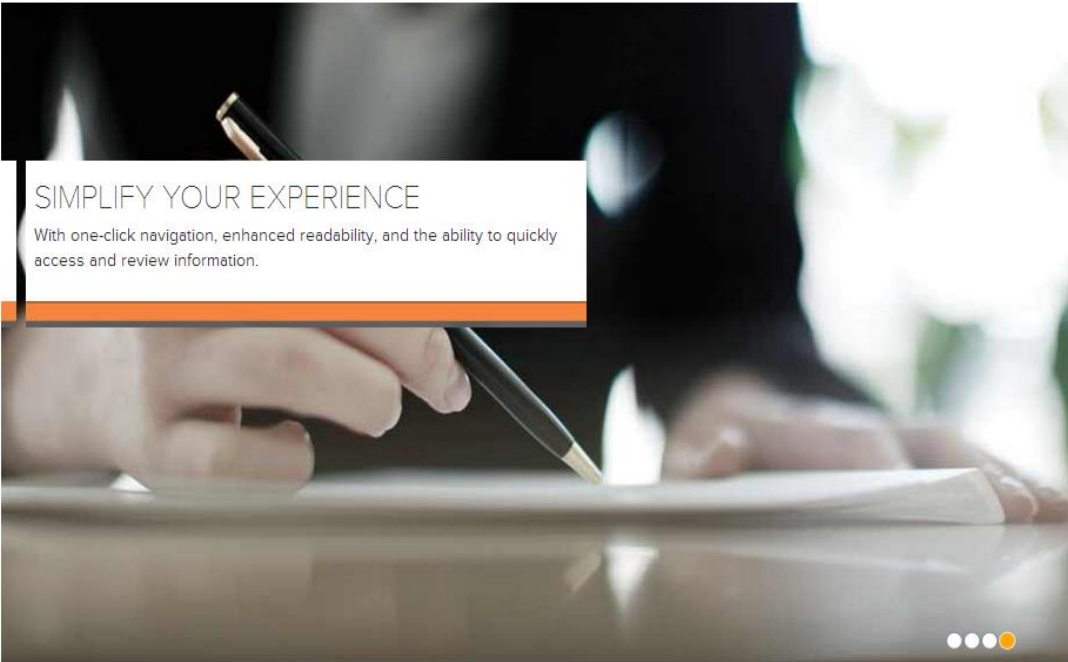


The information available through your online access is provided on behalf of SHAREHOLDERS SERVICE GROUP INC by Pershing LLC (member FINRA, NYSE, SIPC), a subsidiary of The Bank of New York Mellon Corporation.

Please add [edelivery@mydocumentsuite.com](mailto:edelivery@mydocumentsuite.com) to your address book to help ensure that you continue to receive e-mails from SHAREHOLDERS SERVICE GROUP INC .

If you are not able to view this e-mail, copy and paste the address below into your browser.

You will now be able to log in to view your account(s) using the User ID you created during the registration process. Financial organization number is 47Y.



**Login**

47Y

User ID

Remember me

**Quick Quote**

Enter Symbol or Name

**Need an ID?**

NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week.

Sign up today to access your account online.

After logging in you will get the Setup Your Security Questions page. You can check the box to remember your computer to bypass the security questions every time you log in.



### Security Setup

1. Security Questions    2. Security Image    3. Security Phrase    4. Security Review

#### Please Setup Your Security Questions

These questions assist in verifying your identity when logging in from different devices.

Mask Response to Secret Questions

Select a Question ▼

Answer

Select a Question ▼

Answer

Select a Question ▼

Answer

Select a Question ▼

Answer

Remember this device to avoid answering these questions upon login.

Do not check if you are accessing this website from a public device

Continue

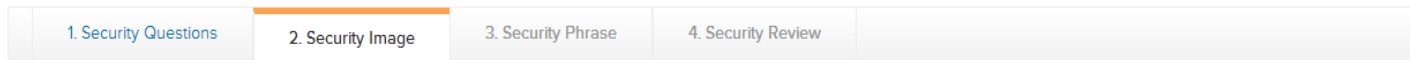
#### Security Questions Rules

1. All four questions must be answered.
2. All four questions must be unique.
3. Answers must contain a minimum of three (3) alphanumeric characters.
4. Answers must contain only alphanumeric characters and spaces.

You will now be able to set up a security image and security phrase; you will see your image and phrase every time you log in.



### Security Setup



#### Please Set Up Your Security Login Information

Your security login information consists of a phrase and Image. This security feature will be used to identify the legitimate NetExchange website. When logging in, do not enter your password if you do not see your personalized phrase and picture. This security feature prevents imposter websites from phishing for your personal information.

Step 2. Select an image from our image library.



Select



If you have multiple accounts you will see this page asking you to link your additional accounts. Our recommendation is for you to link your all of your accounts.

**NETX INVESTOR**™ for Shareholders Service Group, Inc., clearing through Pershing LLC. 1-800-380-7370  
Last Login: Apr 30, 2014 03:34 (EDT)

Quick Quote

Portfolio Transact Research Tools **Communications**

Go paperless

All Communications **Settings**

### 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"/>	IRA FBO MICHAEL D PENSINGER PERSHING LLC AS CUSTODIAN ROTH ACCOUNT

This information is provided by Shareholders Service Group, Inc. through Pershing LLC, member [FINRA](#), [NYSE](#), [SIPC](#), a subsidiary of The Bank of New York Mellon Corporation.

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You should be all set to go. As always if you have any questions, concerns, or problems setting up your registration please do not hesitate to contact us. Thank you.

- Pensinger Financial