

# Going Digital

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## ***Suggested language to help engage your firm and clients.***

**Subject:** Digital resources to stay connected during these times

Dear [NAME],

I hope this message finds you and your loved ones safe during these unprecedented times.

I encourage you to access NetXInvestor<sup>®</sup>, an online investor platform, or download the mobile app to stay connected. From there, you can have 24/7 access to account information, view statements, get quotes, perform market research and much more.

Additionally, the platform features several other digital tools to help stay connected. This includes:

- Sign up for **e-Delivery** to go paper free and receive statements, confirmations, shareholder information, account notifications and letters electronically, eliminating mail to your house and expediting access to these documents. Just click Go Paperless and follow the instructions on-screen.
- Save time by using **Mobile Check Deposit** to upload funds to your account straight from the NetXInvestor mobile app using iPhone, iPad or Android. From the site menu, scroll to the Transact section and click Mobile Deposit.
- Configure **One-Time Passcode (OTP)** for easier password resets and added security. Once logged in, the Security Email Setup page displays and will prompt for your email address. Continue with the on-screen instructions to complete the process.
- **Move money** with greater convenience by **linking a bank account to your brokerage account** to transfer funds online. Set up an Automated Clearing House (ACH) link to a bank through Instant Account Verification.<sup>1</sup>
- **View, pay and manage your bills online** with BillSuite<sup>™</sup> powered by through Corestone<sup>®</sup>, Pershing's asset management account.

To get started, go to [netxinvestor.com](https://netxinvestor.com) and click Register Now to complete the self-registration process.

If you have any questions, or if we can be of assistance to you, please feel free to contact me.

Stay safe and be well.

All my best,

[INSERT ADVISOR EMAIL SIGNATURE]

<sup>1</sup> Instant Account Verification service provided by Yodlee, an Envestnet company