

NetX360[®] Mobile

Did You Know?

You can now make deposits on behalf of your clients, using Mobile Check Deposit (\$80,000 limit).

Stay productive on the go with NetX360[®] Mobile

Anytime, Anywhere Access

With a few clicks, you can track your practice through the NetX360 Mobile dashboard and gain actionable intelligence into what's happening in the market and with your clients' accounts. With NetX360 Mobile, you can:

- › Access your clients' account profile, balances, holdings and activity while you're out of the office
- › View the balances, holdings, activity, market value, money funds, equity and cash available in client accounts
- › Stay ahead of market shifts by absorbing real-time information and access to your watchlists
- › Access powerful financial planning tools, including a completely integrated MoneyGuidePro solution, that allow you to deliver a comprehensive financial plan anywhere your client wishes to meet
- › Receive alerts for time-sensitive items that need immediate attention
- › Trade equities, ETFs and mutual funds

Easy to Use

- Same user ID and password as NetX360
- Experience optimized for mobile devices



At Your Fingertips

- Anytime, anywhere access
- Provides access to client account information, balances, activity and more



Up-to-Date

- Live updates on balances and account holdings
- Advisors can stay current on positions, quotes, market indices, order status, etc.



Full-Featured

- Mobile check deposit
- Equity and mutual fund trading
- Asset movement
- Document upload
- Presentation mode
- View account workbook
- Push notifications
- View work status



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Getting Started



*NetX360 Mobile is available from the Apple® App Store® on your iPad® or iPhone®, from the Microsoft® Windows Store on your Windows® 8 Pro Tablet, or in Google Play™ on your Android™ Smartphones.

Anytime, anywhere—that is the power of mobility¹. That is the power of NetX360 Mobile.

To learn more, please visit Mobile Center in NetX360 under the Tools menu or speak to your Account Manager.

¹ Subject to system availability and an internet connection.

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