

NetXInvestor[®] Mobile

DID YOU KNOW?

Clients can fund accounts remotely, and easily, through Mobile Check Deposit (\$50,000 per check limit.)⁵

NetXInvestor Mobile app is available for iOS devices on the Apple App Store and for Android devices on the Google Play Store.

The NetXInvestor Mobile app is also available on the Apple Watch™², providing a quick look at important financial activities. Clients can take advantage of the faster interactions on the watch to stay up-to-date on their investment accounts.

Key mobile features include:

- Balance detail
- Activity screens
- Holdings information
- Alerts for trades, price, activity and performance
- Self-service password reset
- Biometric authentication through facial or fingerprint recognition

PROVIDE YOUR CLIENTS ON-THE-GO ACCOUNT ACCESS— WITH NETXINVESTOR MOBILE.

Anytime, Anywhere Access.¹

On the road, in the office or on a mobile device, your clients have access to their accounts at their fingertips. NetXInvestor Mobile is adaptive to mobile devices, meaning it will recognize your device and accommodate to your screen size, while still offering many of the same features as the desktop application.



Easy to Use

- Access using fingerprint, facial recognition or existing NetXInvestor ID and password
- Consistent functionality across all devices



At Your Fingertips

- Anytime, anywhere access
- Provides access to account information, documents, and activity



Up-to-Date

- Live updates on balances and account holdings
- Account aggregation and performance reporting*
- Clients can stay current on positions, quotes, market indices, order status, etc.



Self-Service Options³

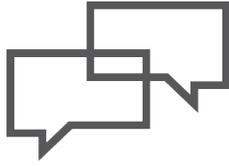
- Mobile check deposit⁴
- Equity and mutual fund trading
- Transfer funds (ACH) and request a check
- Statements, trade confirmations and other communications

Branding Capabilities:

The NetXInvestor app can be white-labeled to incorporate your firm's branding to support a consistent look and feel.

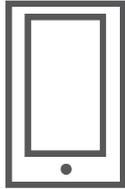
GETTING STARTED

1



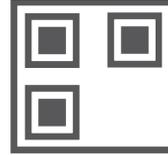
Meet with your Account Manager and complete enrollment form.

2



Enable NetXInvestor splash page for your clients (can be customized with your own colors and branding).

3



Instruct clients to follow splash page instructions to download mobile app.

- Clients who have a NetXInvestor ID and password can use the same one for mobile
- New clients can download the app and follow the prompts for self-registration

It's a digital world and investors are expecting a complete digital experience. To learn more about NetXInvestor Mobile, please contact your Account Manager or Home Office.

¹ Subject to system availability and an Internet connection.

² Apple Watch is a trademark of Apple Inc.

³ Access to these features by the investor requires entitlements.

⁴ Only available in the native app.

⁵ Subject to firm approval

*Available through Albridge Solutions, Inc. an affiliate of Pershing LLC, both wholly owned subsidiaries of The Bank of New York Mellon Corporation (BNY Mellon).