

- NetX Investor for HFG Clients -

NetX Investor: Online Access and E-Delivery for Pershing Accounts

When you open a Direct or Advisory account, you will be enrolled in NetX Investor, www.netxinvestor.com, which provides online access to your Pershing account information and documents.

Shortly after your account has been opened, our team will email you your user name. Once you reply, you will be sent your password formula.

Enter financial institution ID [always “5MC”] and your user ID [provided in the first credentials email.]

This information is provided by NetXInvestor through Pershing LLC, member FINRA, NYSE, SIPC, a subsidiary of The Bank of New York Mellon Corporation.

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When logging in for the first time, you will be prompted to set up identity verification via call, text, and/or email, as well as additional security features.

Hathaway Financial Group, LLC is an independent firm of Money Concepts - 11440 North Jog Road, Palm Beach Gardens, FL 33418, 561-472-2000. All securities through Money Concepts Capital Corp., Member FINRA/SIPC.

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Tips for successfully navigating NetX Investor:

Statements can be found on the “Communications” tab.

To **update your email address**, go to “Communications,” then “Settings.”

Cannot remember password, user ID, or locked out?

If you have already set up identity verification settings, you can click “forgot password” on netxinvestor.com. Otherwise, contact an HFG team member for your credentials and/or to have your account unlocked and re-set. We will email you new instructions.

New [temporary] password not working? Remember to use the correct date of birth and code name with the MMDDYYNN formula provided in the email. This may be your spouse, joint owner, co-trustee, etc. Call us if you are unsure of your credentials.

User ID and password no longer working? Long periods of inactivity or invalid email addresses may lock you out. Contact us to unlock your account. Log in regularly, and update your communication settings if you have a new email address.

Still receiving mail after going paperless? If you are still receiving notices more than 30 days from the time you enrolled in paperless delivery, log on and check your settings in the “Communications” tab. Make sure all the boxes are checked for which you would like to opt out of paper, and verify the email address is correct.

Can't open or view statements? You might need to update Adobe Reader to the latest version.