CAMBRIDGE

NETXInvestor Startup Guide

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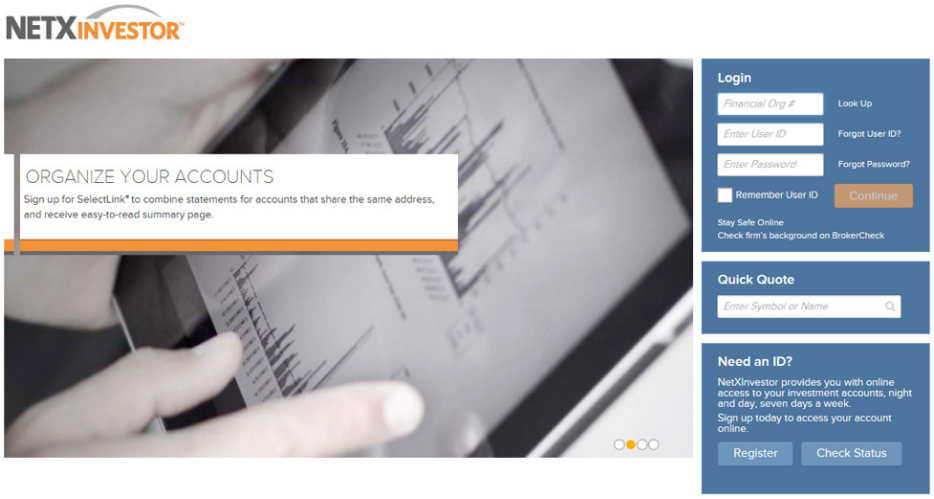
I. Log In

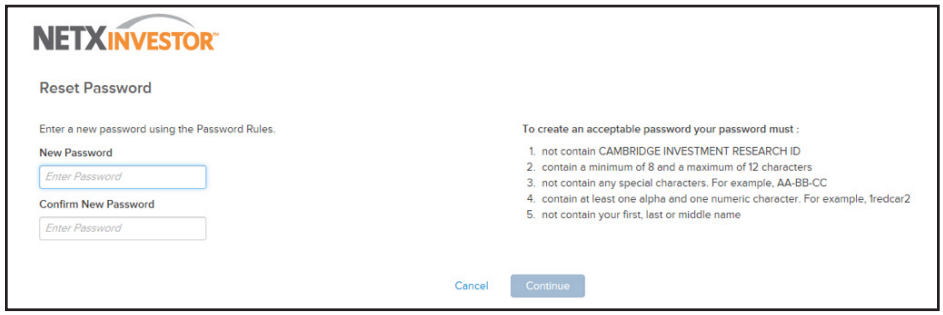
To log in, go to www.netxinvestor.com



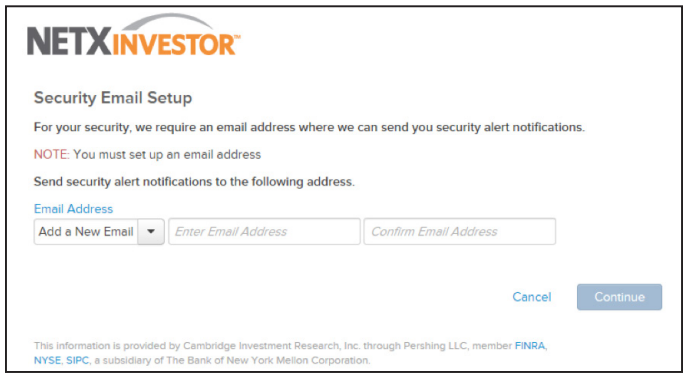
Enter the financial organization number **5CR** in the Login box, enter your user ID and password, click **Continue.**

A. Create or Change Your Password

You will be required to create your own password. Enter your **New Password** and then enter your **New Password** again in the Confirm New Password field and click **Continue.**



Once logged in, enter your email address in the fields provided on the Security Email Setup page and click **Continue.**



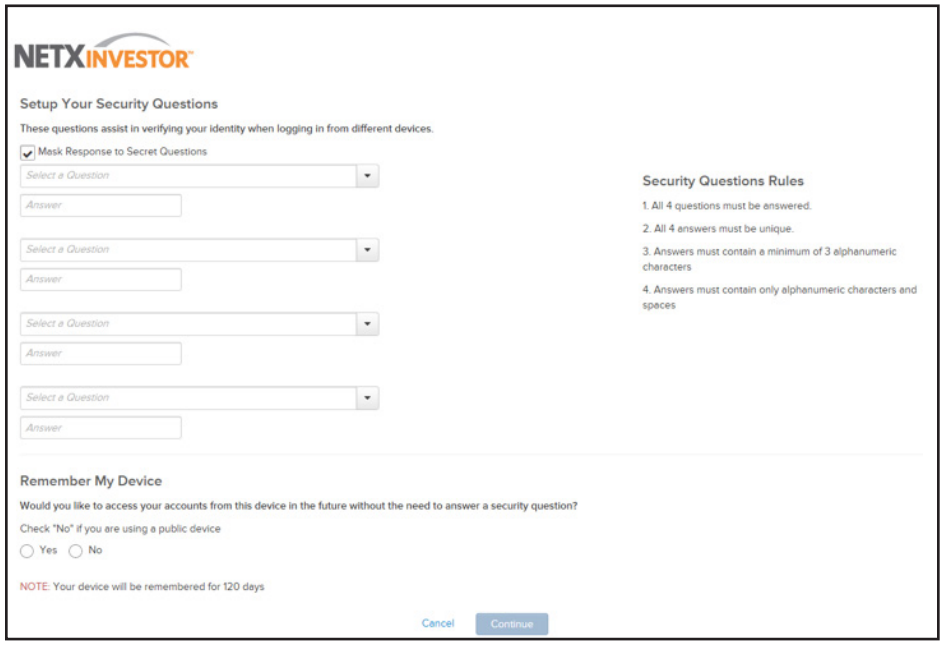
II. How to Setup Your Account

A. Setup Your Security Questions

After completing the Security Email Setup information, you will need to set up your security questions. To view what is being typed in the Answer box, uncheck **Mask Response to Secret Questions.**

Select four questions with the dropdown arrow and type your answer.

To access your accounts from this device in the future without the need to answer a security question, click **Yes** under Remember My Device.

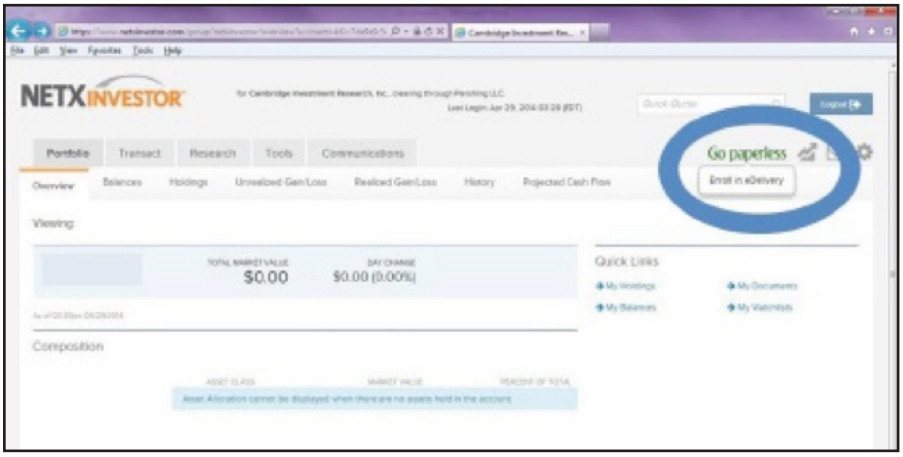


Click **Continue.**

III. How to Enroll in eDelivery

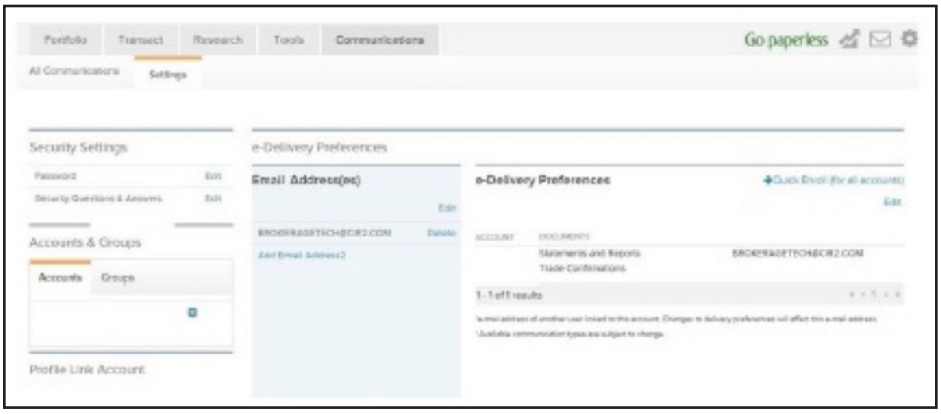
A. Setup Go Paperless Options

To set up eDelivery, click **Go paperless,** in the upper right hand corner of your screen.

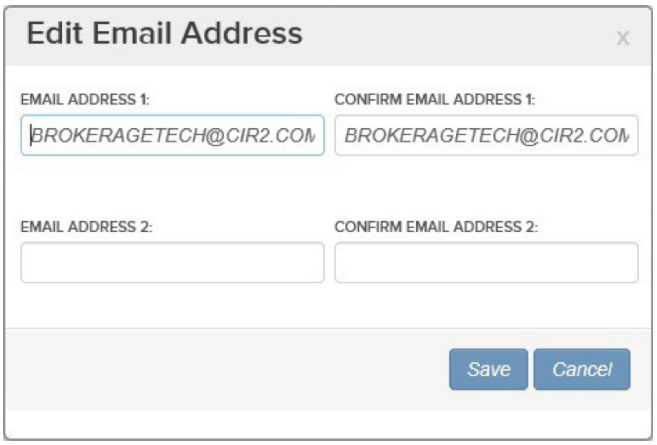


B. Add or Setup Email Address(es) for eDelivery

After clicking **Go paperless,** update or add an email address for eDelivery. Click **Edit** in the email address(es) box in the center of your screen.



Enter and confirm your email address(es) and click **Save.**



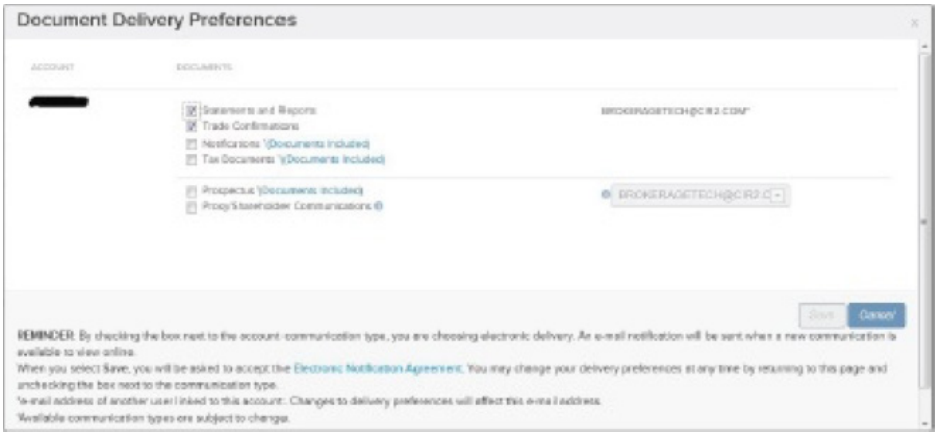
C. Setup Document Delivery Preferences

To change the documents that are sent via eDelivery and/or via paper mailings, click **Edit** under **Document Delivery Preferences.**

Click the boxes next to the account communication type for electronic delivery. An email notification will be sent when a new communication is available to view online.

Click **Save** and accept the Electronic Notification Agreement.

Please note: available communication types are subject to change.



If you have questions, contact the Cambridge Operations Development and Technology Team (brokeragetech@cir2.com) at 800-777-6080.

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