SecondHalf Coach Wealth Management

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NetXInvestor Self-Registration
View your Pershing Accounts Online and Go Paperless!

Please follow these instructions to register so that you may access and monitor your account(s) online. You must register for NetXInvestor to update your communication preferences if you would prefer to receive your account statements electronically rather than through the regular mail.

1. Go to www.spfview.com to access NetXInvestor.
2. Click the Green "Register" button in the bottom right corner of the screen.
3. Review and agree to the terms and conditions regarding identify verification.
4. Follow the prompts to complete the registration. You will need the following information:
    a. Your social security number
    b. A valid email address to which you have access during registration
    c. Your Pershing account numbers
5. *IMPORTANT:* You must activate the account by clicking the link in an e-mail that will be sent to the e-mail address provided. You must do this within three calendar days of registering.
6. After you activate the account, NetXInvestor will request to send a security pin either by email or text message to verify the computer or device through which you are logging in. You simply need to check your email or messages and follow the link or enter the code. You will have the option to remember the device so that you do not have to go through this security measure again in the future. You will likely have to go through this step on any new device you use to access your account online. **Be sure to record your created username and password in a safe place.**

Go Paperless!

1. After you complete registration, return to www.spfview.com and login.
2. Click on the Green "Go Paperless!" icon in the top right corner of the page.
3. You may opt for "Quick Enroll" to easily enroll all of your accounts in paperless communication at once, or you can go into each account individually and select the specific documents that you would like to receive electronically.
    a. *NOTE:* Any documents that you opt to receive electronically will be sent to and stored within your electronic filing cabinet within NetXInvestor. To view these documents, you will have to login and access the "Communications" tab. Opting for paperless delivery on Statements and Reports does not include the Quarterly Performance Report that you will continue to receive in the mail from Sagepoint Financial, Inc.

If you need assistance with this process, please don't hesitate to contact our office.

Securities and advisory services offered through SagePoint Financial, Inc., member FINRA/SIPC.
Insurance services offered through SecondHalf Coach Wealth Management which is not affiliated with SagePoint Financial, Inc.