NetXInvestor®

ONLINE ACCESS

WADDELL & REED
Financial Advisors®

Waddell & Reed provides online access to your investment accounts, night and day, seven days a week. Register your account(s) online to take advantage of this service.

WHAT YOU'LL NEED:

- A computer with a secure internet connection. Preferably, a computer on your home network; generally speaking, signing in at a coffee shop, library or other publicly available internet location is less secure than a password-protected home network.
- Your account number(s)
- Your Social Security number
- An email address

HOW TO SIGN UP FOR ONLINE ACCESS IF YOU DO NOT HAVE A USER ID:

STEP 1: Open your web browser and go to https://waddell.netxinvestor.com

STEP 2: Click "Register" in the "Need an ID" box. It will be under the "Login" and "Quick Quote" boxes.

STEP 3: Click "Start Registration."

STEP 4: Please read the Terms and Conditions. If you agree with the Terms and Conditions, click the "I Agree" box, before clicking the "Continue" button. If you do not agree, click "Cancel." Clicking "Cancel" will return you to the home page and end your registration process.

STEP 5: Fill in the relevant information (e.g., first name, last name, Social Security number). When finished, click "Continue."

STEP 6: Please answer the identification questions. The questions are obtained from a third-party public database and are intended to verify your identity. Select the correct answers and click "Continue."

STEP 7: Create a User ID and password by filling out the input fields. Your User ID should be something easy to remember, most people use some variation of their name (e.g., john.smith; jsmith; johnallensmith) sometimes including numbers, such as a birthday, if their name is particularly common (jsmith011579). A guideline for creating passwords is provided; please follow it to create an acceptable password. Click "Complete Registration" when finished.

STEP 8: You've created an account. Now login to access your Waddell & Reed account.

ACCESSING YOUR WADDELL & REED ACCOUNT IF YOU HAVE ALREADY ESTABLISHED AN ONLINE ACCOUNT WITH YOUR ADVISOR:

STEP 1: Open your web browser and go to https://www.waddell.com

STEP 2: In the top right hand corner of the webpage click "Client Account Access." On the next page, click "Brokerage Account Access" to be directed to the login page.

STEP 3: Enter your user ID and password into the login fields.

User ID – Your user ID would have been selected on your New Account Application upon opening an account.

Password – The first time you log in your password will be WA followed by your birthday (MMDDYY).

For example, if you were born on January 15, 1979, your password would be WA011579. Passwords are case sensitive.

STEP 4: You will be asked to change your password after logging in for the first time. Your password must meet the following requirements:

- It cannot contain your Waddell & Reed User ID.
- It must contain a minimum of eight (8) and a maximum of thirty-two (32) characters.
- It must contain both lowercase and uppercase letters.
- It cannot contain any special characters (e.g., #, @, %).
- It must contain at least one alpha and one numeric character (e.g., Wildcat123).
- It cannot contain your first, last or middle name.

STEP 5: Set up a secure email address. Select from an existing email address or click "Add a New Email."

Enter email address and confirm, if required.

STEP 6: You will be asked to provide answers to security questions. Please avoid duplicate answers. This is a security feature to prevent unauthorized use of your online account. If you log in at a later date and the questions are not correct, notify your financial advisor or contact Waddell & Reed Client Services immediately.

STEP 7: You are now logged in and have online access to your Waddell & Reed account.