

# Welcome to NetXInvestor

## Register for online Access and eDelivery

MY  
ACCOUNT

### Let's get started?

- 1 Go to [lincoln.netxinvestor.com](http://lincoln.netxinvestor.com) and click Register Now.
- 2 Select Start Registration.
- 3 Accept the Terms & Conditions.
- 4 Enter your profile information. This information will be used to authenticate your identity by a third-party vendor. Authenticating your identity in this manner will NOT impact your credit rating.
- 5 Create a temporary user ID and password and click Complete Registration.

**Verify your identity and proceed.** To verify your identity and for the security of your information, you will be asked three questions.

Confirm registration setup. An email with further instructions is sent to the entered email address. Action must be taken within three days of receiving the email.

- 6 Click the link in the email within three days to make the user ID permanent. Create personalized security questions when prompted.

**The self-registration for online access is completed!**

### Enroll your accounts in eDelivery today!\*

- » Click Enroll Today and the eDelivery Preferences window displays.
- » Select the boxes next to the documents you want to receive via eDelivery.
- » Select the email address where you want to receive eDelivery notifications.
- » Click Save. Read the terms and conditions, and click I Agree. Your eDelivery preferences have been saved.

\*Paper statements, tax documents and other important docs will incur a fee.

**1** GO PAPERLESS WITH eDELIVERY

Secure, swift and convenient. The benefits of eDelivery are a sensible alternative to traditional mail. Enroll by clicking "Go Paperless" at the top of any page after logging in.

LOGIN

Not Enrolled? Register Now

**2** Welcome

The registration process will allow you to create a new user ID and password with which to access your investment information on this site. Please contact Lincoln Investment Planning, LLC if you have an existing user ID and wish to link additional accounts. You will be guided through 4 simple steps to complete your registration, during which you will be asked to:

1. Review and agree to the Terms and Conditions regarding the use of this website
2. Provide user information, including an e-mail address
3. Verify your identity
4. Create a user ID and secure password

At the end of the process you will have to activate your ID by clicking a link in an e-mail that will be sent to the e-mail address you provided.

Start Registration

**3** Terms & Conditions

Read and agree to the terms and conditions of the Identity Verification Agreement before proceeding.

Identity Verification Agreement

You must have a Social Security number to register on this site. If you do not have a Social Security number, please contact your financial organization for assistance. In addition, you must register using an account for which your Social Security number is primary on the account. For example, you cannot register using a joint account or a primary account holder.

When registering on this site, you will be asked a series of multiple-choice questions. The questions have been developed by a third-party vendor based on information from private and public databases. Your answers are compared by the vendor to the information available from these sources.

You may be asked questions about yourself, people you know or were once associated with, places you have lived or worked, and the like. The information used in this regard is only used to the information on the specific accounts held at your financial organization.

We strongly encourage you to review the Frequently Asked Questions about online registration, which provide greater detail about the identity verification process.

Successful online registration will provide immediate access to your accounts. At this time, accounts without a Social Security number are not eligible for online registration. A Social Security number is not recognized as being associated with the account number you enter into the system, your online registration will be unsuccessful.

Agree with online registration, please click I Agree below.

I Agree

**4** User Information

Provide the following information, which will be used to authenticate your identity. This service is provided by a third-party vendor. Authenticating your identity in this manner will NOT impact your credit rating.

Please do not click the "Back" button in your browser during the registration process.

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Address Line 1: \_\_\_\_\_ Address Line 2 (optional): \_\_\_\_\_

Zip Code: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_

**5** User ID & Password

Create a temporary user ID and password.

User ID: \_\_\_\_\_ Password: \_\_\_\_\_ Confirm Password: \_\_\_\_\_

Email Address: \_\_\_\_\_ Confirm Email Address: \_\_\_\_\_

Address's Maiden Name: \_\_\_\_\_ Date of Birth: (MM/DD/YYYY) \_\_\_\_\_

**6** Thank you for registering for online access to your investment information with [lincoln.netxinvestor.com](http://lincoln.netxinvestor.com), a service provided on behalf of LINCOLN INVESTMENT PLANNING, LLC.

Click here to complete the registration process and enroll your accounts for paperless delivery of account communications. Alternatively, you can cut and paste the link at the bottom of this e-mail to complete the registration. You will then be prompted to set up additional authentication to ensure a secure online experience.

11/01/2023

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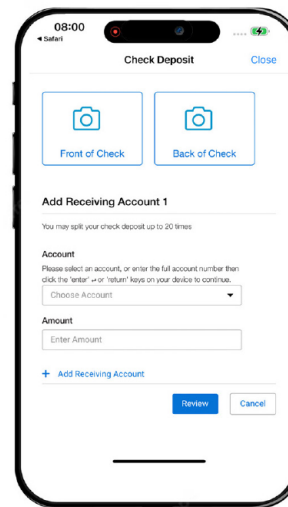
## ANYTIME, ANYWHERE ACCESS

On the road, at home, or in the office, access to your account information is available at your fingertips with the mobile app. It includes all of the great features you get from your computer with added benefits like biometric authentication to log in quickly and easily with facial or fingerprint recognition.



### LOOKING FOR THE MOBILE APP?

Download the NetXInvestor app directly to your mobile device. It's available for iOS devices on the Apple App Store and for Android devices on the Google Play Store by searching for "NetXInvestor".



### NEED TO FUND YOUR ACCOUNTS QUICKLY?

No problem. Mobile check deposit and other digital options to transfer funds allow you to do so quickly, easily, and securely.

*Mobile app features will be available to clients with existing NetXInvestor registrations on January 1, 2024.*

*New registrations to NetXInvestor as of December 1, 2023, will have access to the mobile app.*