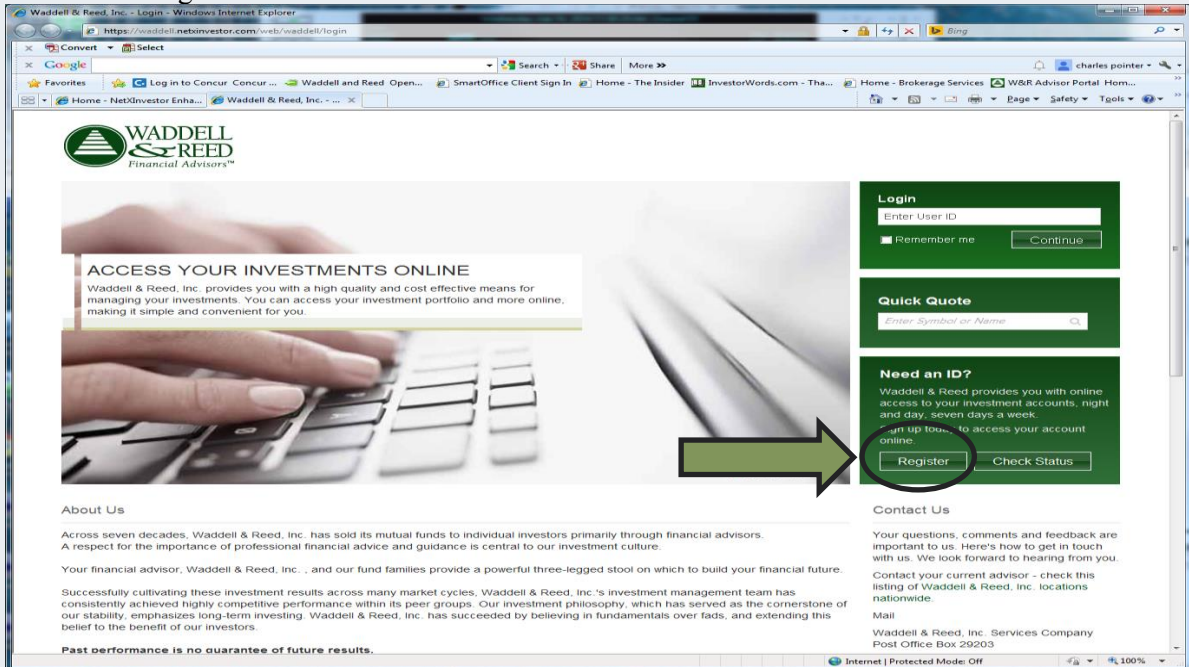
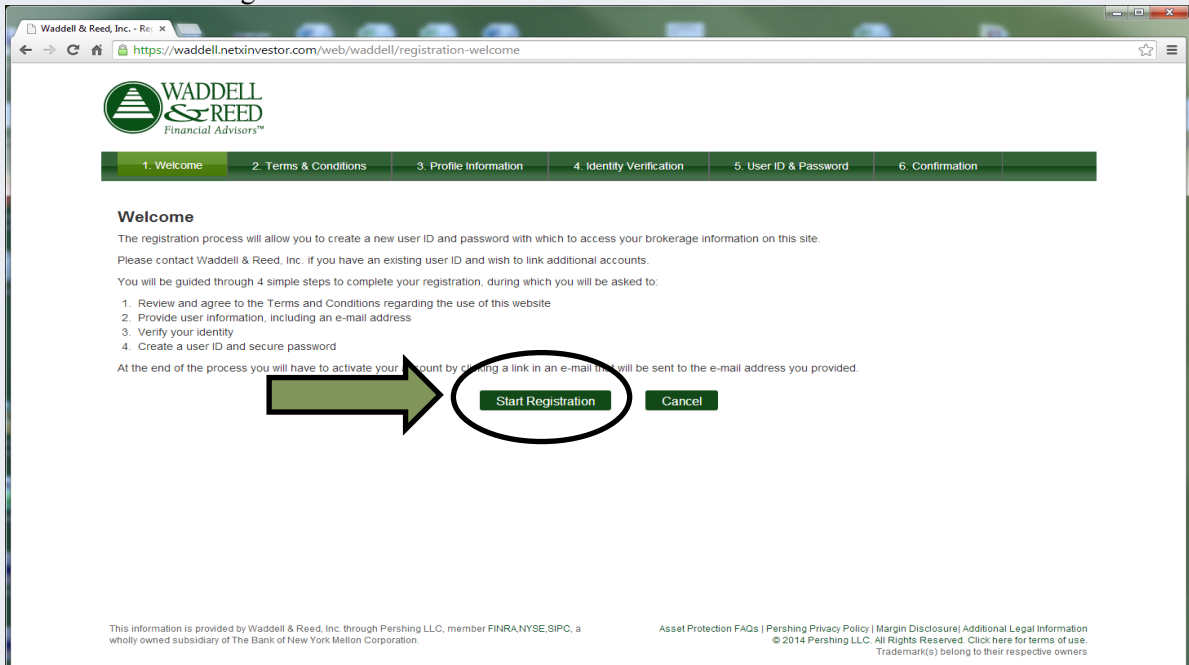


How to Establish a USER ID via NetXInvestor: Waddell & Reed Brokerage Accounts

1. Go to **waddell.netxinvestor.com**
2. Select “Register” to establish a new USER ID.



3. Select “Start Registration”



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4. Terms and Conditions: To agree with the Terms and Conditions, check the box next to “I Agree” and select the “Continue” button.

The screenshot shows the Waddell & Reed NetXInvestor registration page. The browser address bar displays <https://waddell.netxinvestor.com/web/waddell/registration-terms-and-conditions?javax.portlet.faces.DirectLink=true>. The page features a progress bar at the top with six steps: 1. Welcome, 2. Terms & Conditions (highlighted in green), 3. Profile Information, 4. Identity Verification, 5. User ID & Password, and 6. Confirmation. Below the progress bar, the heading "Terms & Conditions" is followed by a paragraph: "Read and agree to the terms and conditions of the Identity Verification Agreement before proceeding." The "Identity Verification Agreement" section contains several paragraphs of text, including a requirement for a Social Security number and a statement of age. At the bottom of the page, there is a checkbox labeled "I Agree" which is checked, and two buttons: "Continue" and "Cancel". A green arrow points from the "I Agree" checkbox to the "Continue" button.

5. User Information: Input information in each of the spaces provided. After completion, select “Continue”.

The screenshot shows the Waddell & Reed NetXInvestor registration page, specifically the "User Information" section. The browser address bar displays <https://waddell.netxinvestor.com/web/waddell/registration-profile-info?javax.portlet.faces.DirectLink=true>. The page features a progress bar at the top with six steps: 1. Welcome, 2. Terms & Conditions, 3. Profile Information (highlighted in green), 4. Identity Verification, 5. User ID & Password, and 6. Confirmation. Below the progress bar, the heading "User Information" is followed by a paragraph: "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." Below this, there is a warning: "Please do not click the 'Back' button in your browser during the registration process." The form contains several input fields: "First Name", "Last Name", "Social Security Number" (with a note: "Please enter your Social Security number using no dashes or spaces."), "Account Number" (with a note: "Please enter an account number for which you are listed as the primary account holder."), "Legal Address" (U.S. address only), "City", "State" (a dropdown menu with "Select State" selected), and "Zip". At the bottom of the page, there is a "Continue" button and a "Cancel" button. A green arrow points from the "Continue" button to the "Cancel" button.

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6. Identity Verification: NetXInvestor will prompt a series of identification questions obtained through a third party public database. Select the answer and select "Continue".

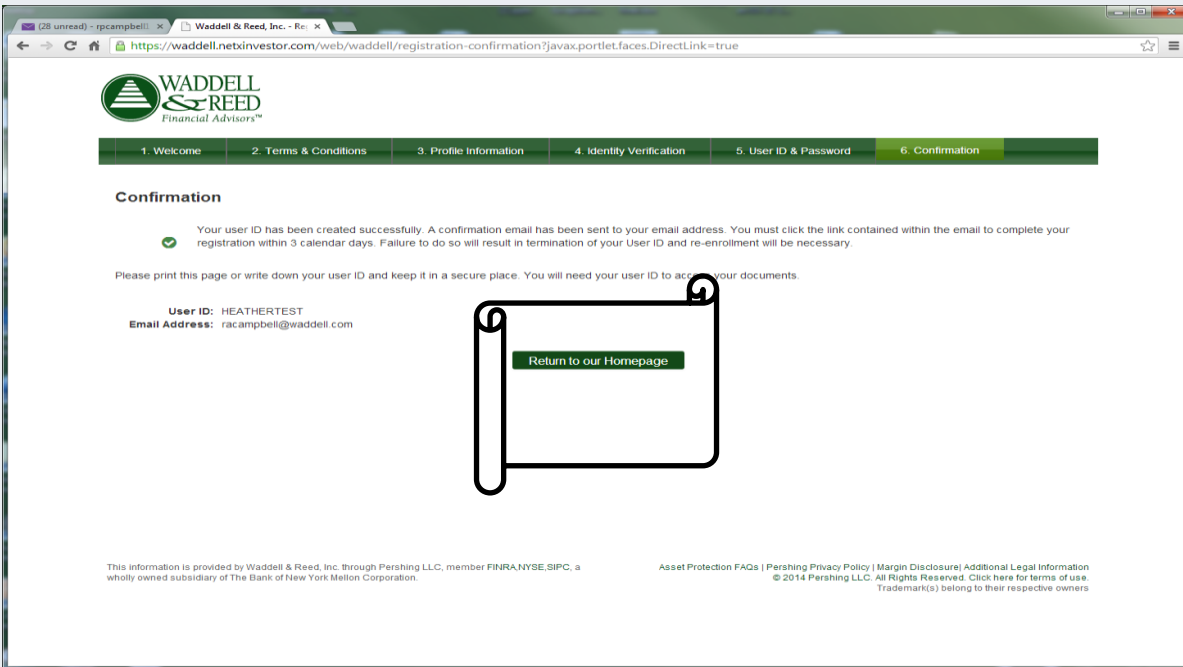
The screenshot shows the Waddell & Reed Financial Advisors logo at the top left. A progress bar at the top indicates the current step is '4. Identity Verification'. The main heading is 'Identity Verification' with the instruction 'Please answer the following required questions to verify your identity.' The question is 'Which of the following street addresses in 'Seattle' have you ever lived at or been associated with?'. There are five radio button options: '13417 43rd Avenue Southeast', '42 Willow Pointe Loop', '421 Meade Avenue', '4616 22nd Avenue Northeast', '827 87th Ave Se', and 'None of the above or I am not familiar with this property'. A green arrow points to the 'Continue' button, which is circled in black. A 'Cancel' button is also visible.

7. User ID and Password: Input information in each of the spaces provided. A guideline for creating a password is included. After completion, select "Complete Registration".

The screenshot shows the Waddell & Reed Financial Advisors logo at the top left. A progress bar at the top indicates the current step is '5. User ID & Password'. The main heading is 'User ID and Password' with the instruction 'Your verification was successful. Please create a user ID and password to continue your registration.' Below this, it says 'All Fields are required.' and lists the fields: 'User ID:', 'Password:', 'Confirm Password:', 'Email Address:', 'Confirm Email Address:', 'Date of Birth:', 'Confirm Date of Birth:', 'Mother's Maiden Name:', and 'Confirm Mother's Maiden Name:'. A green arrow points to the 'Complete Registration' button, which is circled in black. A 'Cancel' button is also visible. On the right side, there is a box titled 'To create an acceptable password your password should:' with five guidelines: 1. not contain WADDELL AND REED, INC ID; 2. contain a minimum of 8 and a maximum of 12 characters; 3. not contain any special characters. For example, AA-BB-CC; 4. contain at least one alpha and one numeric character. For example, 1redcar2; 5. not contain your first, last or middle name.

How to Establish a USER ID via NetXInvestor: Waddell & Reed Brokerage Accounts

CONGRATULATIONS! You have successfully established your USER ID.



Having Trouble?

Please contact your Advisor at XXX-XXX-XXXX or
Email [Advisor/Admin Name] at emailaddress@wradvisors.com