



Park Avenue Securities uses Pershing LLC as the custody and clearing agent for your account. One of the many benefits of this structure is NetXInvestor, an online portal that gives you access to your account statements, trade confirmations, tax documents, account notification, and more. You can also enroll in e-Delivery, and you can receive notification when your latest account statement is available and timely communications by e-mail instead of waiting for them through the mail. It's secure, accessible anywhere, and good for the environment.

**Enrollment is easy, so sign-up today.**

## NetXInvestor Self-Enrollment

### Registration

**Step 1** Visit [ParkAvenueSecurities.com](http://ParkAvenueSecurities.com) and click *Manage Your Account*.

**Step 2** Select *Register*.

**Step 3** Review the welcome screen and select *Start Registration*.

**Step 4** Review the terms and click the *I Agree* button – then the *Continue* button.

**Step 5** Provide your Social Security number, account number, and U.S. mailing address. If there is more than one account owner, use the primary Social Security number for the account.

### Identity Verification

**Step 6** Verify your identity by answering three questions to help further safeguard information. Questions are obtained from public databases, which may include property records, DMV, and car registrations, and your answers are not retained. You may be asked a question where the correct answer is 'does not apply.' Each question must be answered correctly for the process to continue. However, if one question is answered incorrectly, you will be presented with a fourth question. The fourth question must be answered correctly for the process to continue.

### Creating a User ID and Password

**Step 7** Create a user ID and secure password and provide a valid e-mail address. Additional information, including date of birth and mother's maiden name, is gathered in case you need to reset the password in the future. An e-mail will be sent to the address and should be received within 15 minutes so you can continue the process.

### Finalizing Registration

**Step 8** When you receive the e-mail, click the link in the e-mail within three days to complete the registration process. After three days, the link in the e-mail is expired and the ID is deleted for security purposes, and you will need to restart the registration process.

### Registration Completed

**Step 9** Once you have completed the process, a confirmation e-mail will be sent to you.

## First Log In

**Step 1** To log in and view account communications, visit NetXInvestor.com and log in using your newly created user ID and password. Checking *Remember Me* will simplify this process in the future.

**Step 2** The next step is setting up security questions. You must set up four questions and provide answers. You may choose to “unmask” your answers to easily see what you are typing to confirm accuracy.

**Step 3** Next, you will select the security image that will appear each time you log in. Click the blue *Select* hyperlink to bring up a series of images and select one.

**Step 4** Now, you will choose a security phrase, then click *Continue*.

**Step 5** The final step of security verification is to review all of the selections made. Please note: checking *Remember Me* ensures that you do not have to answer these questions on every log-in.

## E-delivery Enrollment

**Step 1** To sign up for e-delivery, click *Go Paperless* from the top right of any page.

**Step 2** After clicking *Go Paperless*, click “*Quick Enroll*” to enroll all account communications automatically or click *Edit* to enroll accounts and communications individually.

**Step 3** If you chose *Edit*, you must check the box next to the account communications you wish to receive electronically. You can return to this screen and update preferences at any time.

**Step 4** If you choose to receive proxy and shareholder communications electronically, you will be asked to enter a four-digit numerical Personal Identification Number (PIN), then click *Save PIN*.

**Step 5** When finished, click *Save*.”

### Confirming Electronic Delivery

**Step 6** On the next screen, click *I agree* to give your consent to receive electronic account communications

**Step 7** After agreeing, you will see a pop-up screen confirming choices; you will also receive an e-mail confirmation as well as a letter, for security purposes. Upon enrollment, it takes five business days for electronic delivery preferences to be confirmed. After that, you will only receive chosen account communications electronically.

### Accessing Electronic Documents

**Step 8** You will receive an e-mail when a new account communication is available to view online. To view the communication, log in to NetXInvestor and click *Communications*, then make a selection from the list that appears on the left.

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