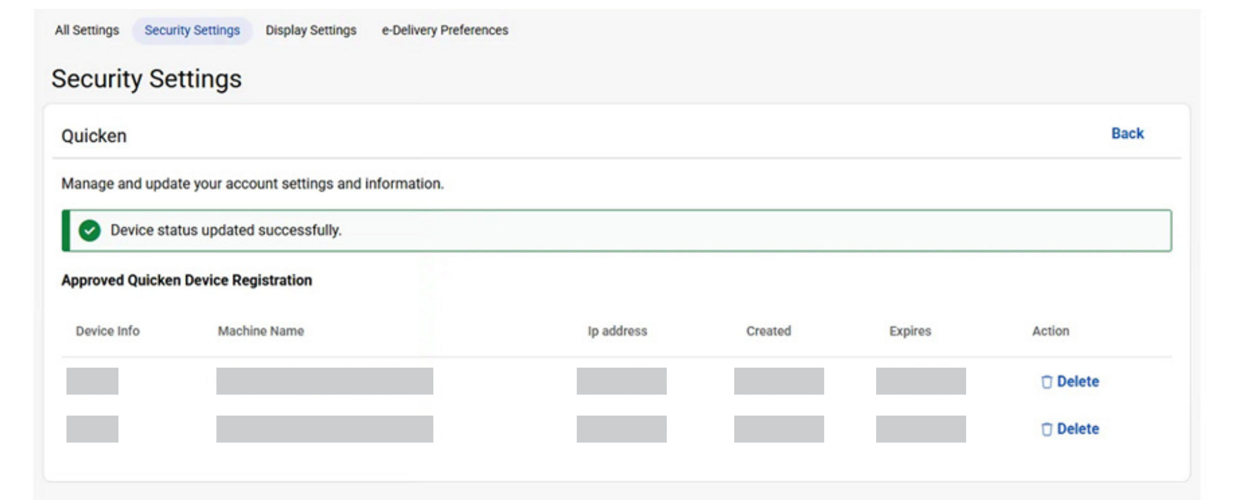
NETXINVESTOR INTEGRATION WITH QUICKEN

To ensure successful integration with Pershing via Quicken, please follow these steps when assisting your clients:

1. **Platform Selection**
   - Clients must choose **NetXInvestor** as their financial institution inside Quicken

2. **User ID Format**
   - When entering their user ID, clients should enter **5cr** in front of their existing ID
   - **Important:** No spaces between 5cr and the user ID
   - Example: If the user ID is johnsmith, they should enter 5crjohnsmith

3. **Security Settings in NetXInvestor**
   - Clients may need to approve Quicken within their **Security Settings**



If you need assistance, contact the Cambridge Digital Experience Team at 888-245-0452, and select option 2.

1776 Pleasant Plain Road | Fairfield, Iowa 52556 | 800-777-6080