

NETXINVESTOR INTEGRATION WITH QUICKEN

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

1. Platform Selection

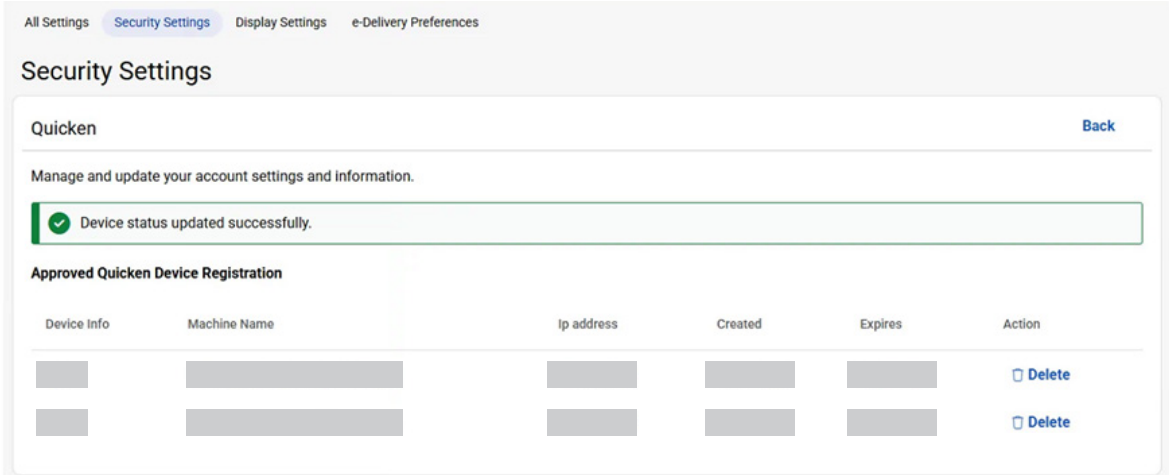
- Clients must choose **NetXInvestor** as their financial institution inside Quicken

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**



The screenshot shows the 'Security Settings' page in Quicken. At the top, there are tabs for 'All Settings', 'Security Settings' (which is selected), 'Display Settings', and 'e-Delivery Preferences'. Below the tabs, the title 'Security Settings' is displayed. Underneath, there is a 'Quicken' section with a 'Back' link. A message box indicates 'Device status updated successfully.' with a green checkmark. Below this, there is a section titled 'Approved Quicken Device Registration'. It contains a table with the following columns: 'Device Info', 'Machine Name', 'Ip address', 'Created', 'Expires', and 'Action'. There are two rows of data in the table, each with a 'Delete' link in the 'Action' column.

Device Info	Machine Name	Ip address	Created	Expires	Action
					Delete
					Delete

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

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