

Net Exchange View/Client® Authorization

Please print, preferably in capital letters and black ink.

Rep/Advisor Name: _____

Rep/Advisor Number: _____

Create New ID Add to Existing ID _____

* Please Note: One ID will be created for all accounts listed on this form. If you would like more than one ID, please submit a separate request form for each ID.

Net Exchange View: \$3/month per User ID. Allows clients to view their positions, account history, account balances and order status online. It also provides your client with online access to account statements and trade confirms, and allows them to suppress the mailing of paper versions of those documents.

Net Exchange Client: \$5/Month per User ID. Adds access to Reuters News and Commentary, Historical Charts Fund Scan, Intraday and Historical Charts, Market News, Fund Center and the S&P Learning Center. 100 free Real Time Quotes per month - additional Real Time Quotes are available at 2¢ per quote, billed to the Rep/Advisor on a monthly basis. Trading is also available at the Rep/Advisor's request (Home Office Approval is required). Please note that the Trading and Real Time Quotes option is ONLY offered on Net Exchange Client.

Client Name	Account Number	DOB	Mother's Maiden Name	Trading Yes/No	Electronic Delivery	
					*Requires Client Signature Statements	Confirmations
					<input type="radio"/>	<input type="radio"/>
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Client Email Address

For Rep/Advisor use

You will be contacted via encrypted email with the User ID and Pin within 24 hours.

Please direct your clients to the following websites:

To Access NetExchange View: www.netxview.com

To access NetExchange Client: www.netxclient.com

Please note that if your client logs into www.netxclient.com you will incur the \$5 per month NetExchange Client charge instead of the NetExchange View charge for that month.

The Financial institution # is 5CR. Please contact Partner Support at 866-866-5005 with any questions.

Signature of Rep/Advisor

Date

Rep/Advisor E-mail address

This email address will be used to send the user ID and Password via encrypted email. If you do not provide an address we will use the primary email address for the rep/advisor.

***Notice:** If more than one client's accounts will be included in one User ID, even if they are married or within the same household OR if the client is requesting eDelivery of statements and/or confirms, the authorized signer for each account must sign this form above.

