
NetXInvestor Help Guide

After the First Republic mobile app and certain features of the firstrepublic.com website have been retired, you can use Pershing Online Brokerage's NetXInvestor site, www.netxinvestor.com, to access your First Republic historical investment account information and tax documents.

The NetXInvestor Help Guide provides:

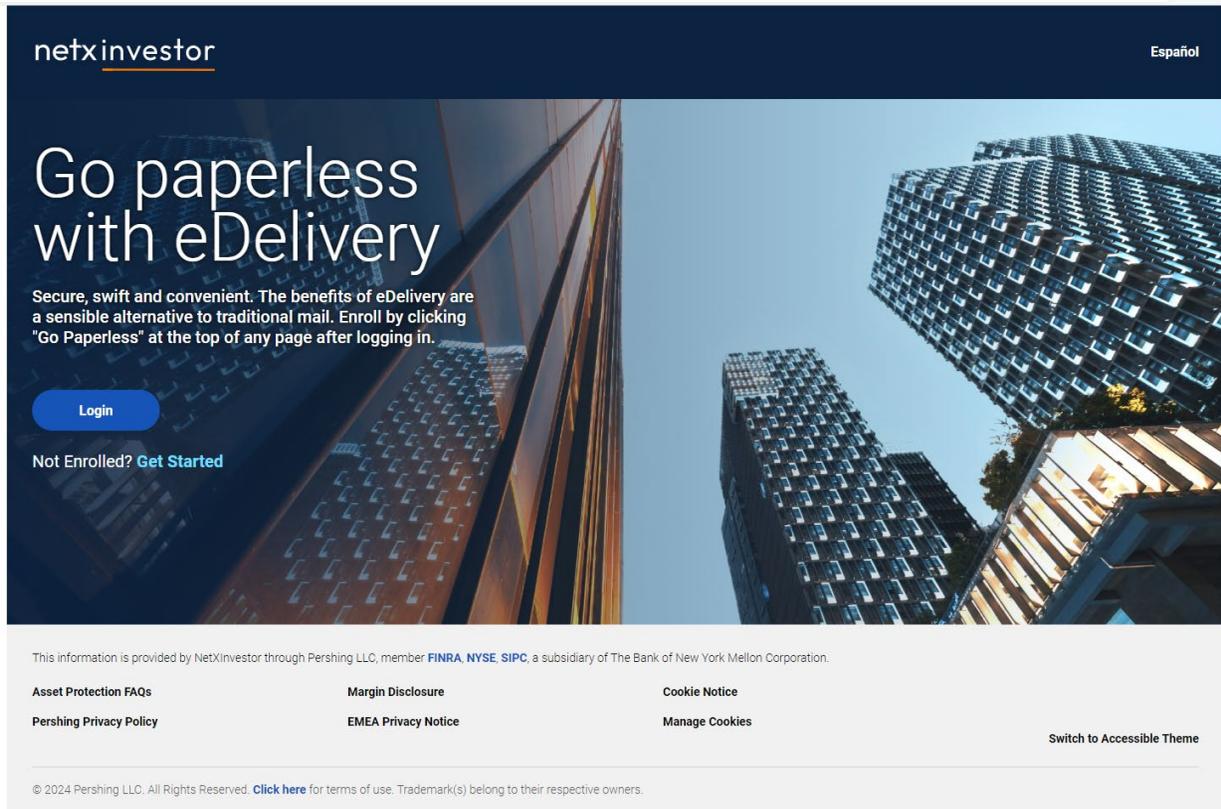
- Step-by-step instructions on how to register for NetXInvestor
- Frequently asked questions (FAQs) about the app and website retirement and registering and accessing NetXInvestor

If you need assistance with registering or accessing NetXInvestor, call us at 1-855-622-0684. We're available Monday through Friday from 10 a.m. to 7 p.m. Eastern Time.

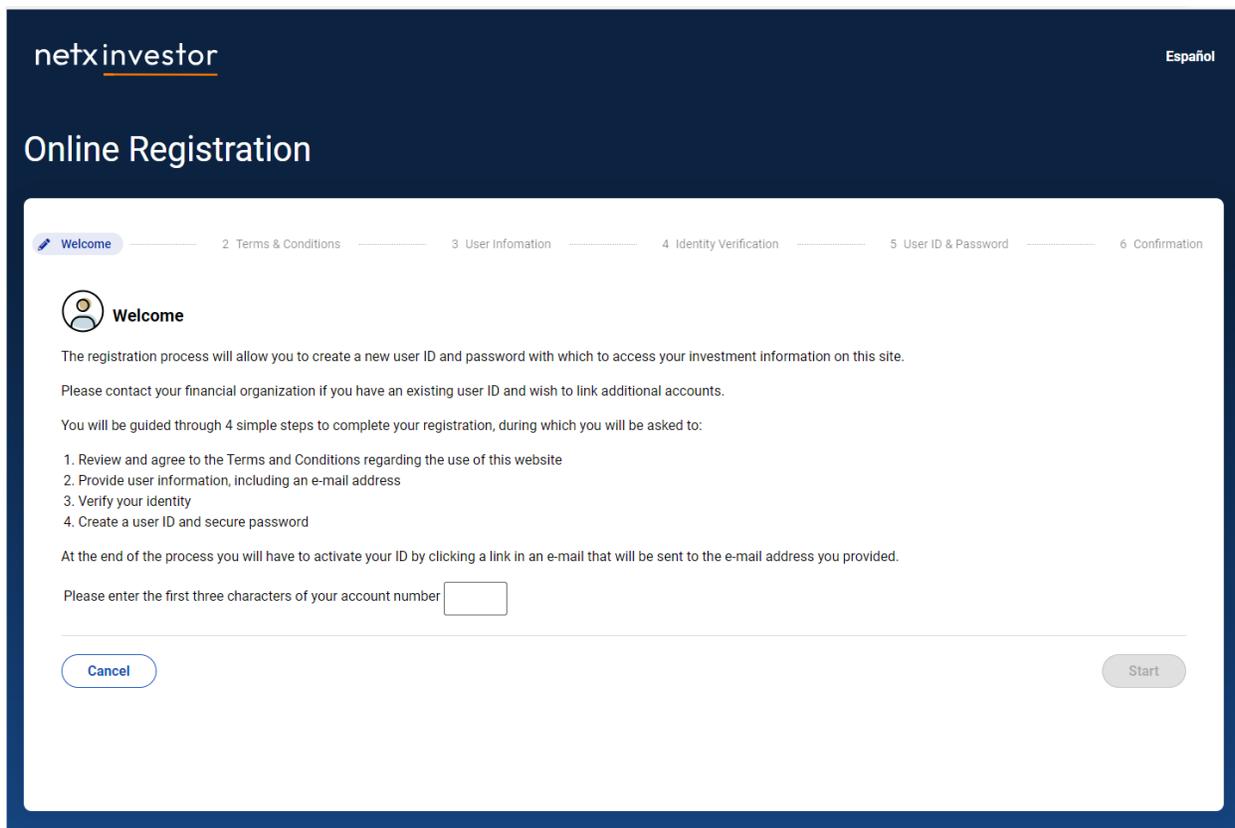
**INVESTMENT AND INSURANCE PRODUCTS:
• NOT A DEPOSIT • NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
• NO BANK GUARANTEE • MAY LOSE VALUE**

NetXInvestor Registration Guide

- 1) Start by visiting www.netxinvestor.com/nxi/welcome
- 2) Select “Get Started”



- 3) Begin the registration process by entering the first three characters of one of your account number(s) on the Welcome screen. Then, select the Start button.



4) Next, read the Terms & Conditions. When finished, select “I agree” and then the Continue button.

Welcome — Terms & Conditions — 3 User Information — 4 Identity Verification — 5 User ID & Password — 6 Confirmation

Terms & Conditions

Identity Verification Agreement

Read and agree to the terms and conditions of the Identity Verification Agreement before proceeding.

You must have a Social Security number to register on this site. If you do not have a Social Security number, please contact your financial organization for assistance.

In addition, you must register using an account for which your Social Security number is primary on the account. For example, you cannot register using a joint account if you are not listed as the primary account holder.

When registering on this site, you will be asked a series of multiple-choice questions. The questions have been developed by a third-party vendor based on information obtained from private and public databases. Your answers are compared by the vendor to the information available from these sources.

You may be asked questions about yourself, people you know or were once associated with, places you have lived or worked, and the like. The information used in these questions is not related in any way to the information on the specific account(s) held at your financial organization.

We strongly encourage you to review the [Frequently Asked Questions](#) about online registration, which provide greater detail about the identity verification process.

Successful online registration will provide immediate access to your accounts. At this time, accounts without a Social Security number are not eligible for online registration. In addition, if your Social Security number is not recognized as being associated with the account number you enter into the system, your online registration will be unsuccessful.

To continue with online registration, please click I Agree below.

If you are ineligible for online registration, or you do not want to complete the registration process online, click Cancel below and contact your financial organization to register.

By accepting this Agreement, you affirm that you are at least 18 years of age.

Read and agree to the terms and conditions of the Identity Verification Agreement before proceeding.

I agree

[Cancel](#) [Continue](#)

5) On the User Information screen, complete each field to authenticate your identity:

- Please provide your full legal name and address, not a business address or PO box. Foreign addresses will not be accepted.
- For the phone number, non-US phone numbers can be used. Please select the appropriate country code. The phone number entered will be used for one-time passcode verification.
- In the Account Number field, enter an account number for which you are listed as an account holder or authorized party (if needed, please refer to a First Republic statement for your account number).

Once you have completed all of the fields, select the Continue button.

Welcome — Terms & Conditions — User Information — 4 Identity Verification — 5 User ID & Password — 6 Confirmation

User Information

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. Please do not click the "Back" button in your browser during the registration process.

All fields are required.

First Name

Last Name

Legal Address Line 1

Legal Address Line 2 (optional)

Zip Code

City

State

Email Address

Country Code

Phone Number

Social Security Number

Date of Birth

Account Number

Please enter an account number for which you are listed as the primary holder.

[Cancel](#) [Continue](#)

* This service is provided by EMC Corporation (NYSE: EMC), a leading developer and provider of information infrastructure technology and solutions.

- 6) Next, you will be asked to answer a series of multiple-choice questions to verify your identity similar to the example below.

The screenshot shows a registration progress bar at the top with steps: Welcome, Terms & Conditions, User Information, Identity Verification (active), User ID & Password, and Confirmation. The main heading is "Identity Verification" with a sub-heading "Please answer the following required questions to verify your identity." The question is "Which of the following boats or watercrafts have you owned?" with radio button options: "10 ft. Alweld Commercial Boats I 1852fvmud", "10 ft. Crestliner Inc 1860 Retriever", "10 ft. Malibu Boats Inc Mxz", "10 ft. Mastercraft Boat Co Llc 2011", "10 ft. Walker Bay Boats Inc. 310slrx", and "None of the above". There are "Cancel" and "Continue" buttons at the bottom.

- 7) After completing verification, you will be asked to:
- Create a unique User ID that is 15 alphanumeric characters in length.
 - Create a password per password rules noted on the screen.
 - Enter your mother's maiden name, which will be used along with your date of birth as the default password in case of password reset.

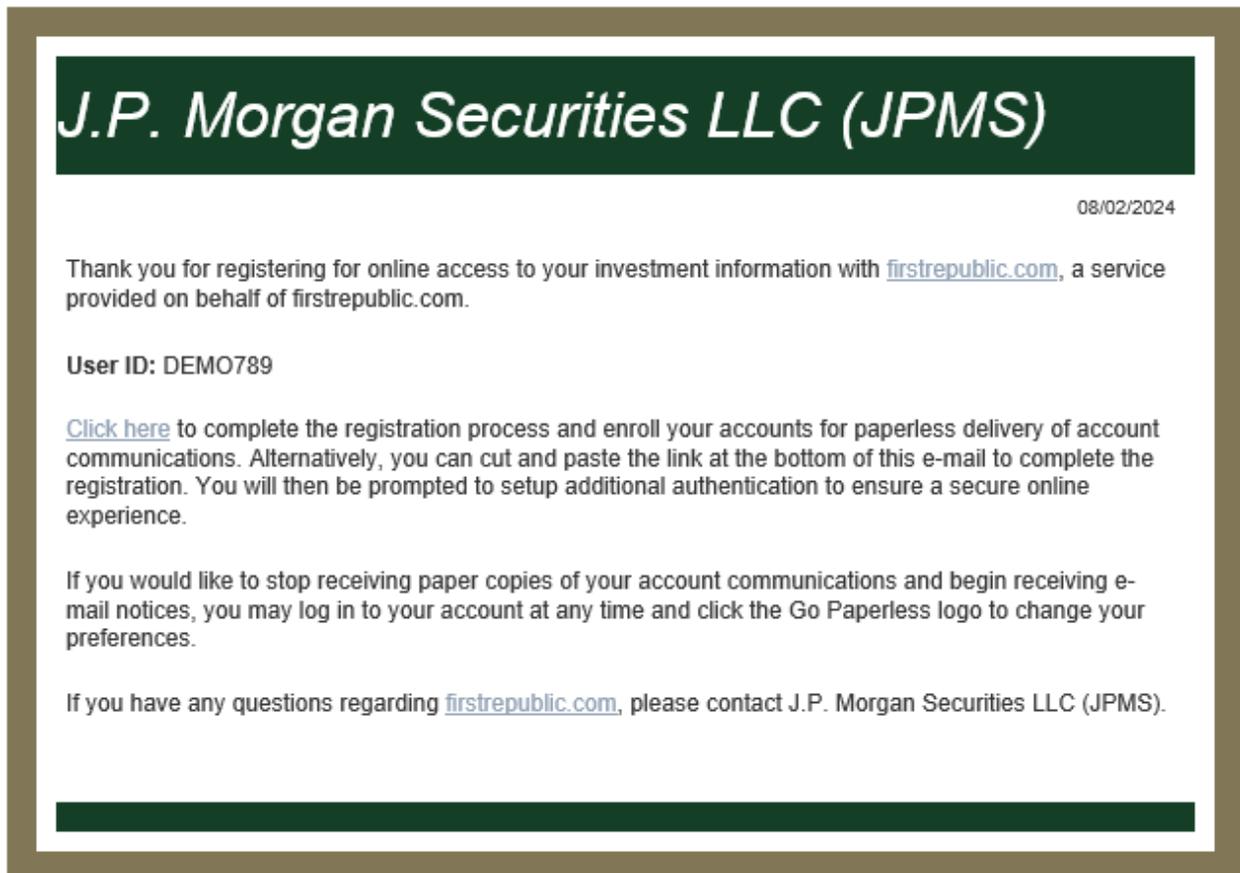
Once you have completed all of the fields, select the Complete Registration button.

The screenshot shows a registration progress bar with steps: Welcome, Terms & Conditions, User Information, Identity Verification, User ID & Password (active), and Confirmation. The main heading is "User ID & Password" with a sub-heading "Create your user ID and Password to complete the registration". There are input fields for "User ID", "Password", "Confirm Password", "Email Address" (pre-filled with "msimmonds@firstrepublic.com"), "Country Code" (pre-filled with "+1 United States"), "Phone" (pre-filled with "415 - 683 - 5216"), "Mother's Maiden Name", and "Date of Birth" (pre-filled with "01/01/2001"). A "Password Rules" section lists requirements: not contain same as the user ID, contain a minimum of 8 and a maximum of 32 characters, contain at least one alpha and one numeric character, not contain linked account(s) name, not contain 3 repeating characters (example: AAA222CCC), not contain reversal of user ID, contains at least one uppercase and one lowercase letter, and a tip about special characters (& * @ : \$ = ! - % . # ? _ |). There are "Cancel" and "Complete Registration" buttons at the bottom.

- 8) Your User ID will be confirmed, and an email will be sent to the email address you provided previously during the registration process with further instructions to complete within the next three days.

The screenshot shows a registration progress bar with steps: Welcome, Terms & Conditions, User Information, Identity Verification, User ID & Password, and Confirmation (active). The main heading is "Confirmation". A blue information box states: "Your next steps for registration have been sent to your email. Please complete this process within 3 calendar days." Below, it says "User ID: testing86" and "Thanks for helping us keep your account secure! Your ID has been created, but there's one more step to take before you can access your account. We sent an email to you at msimmonds@firstrepublic.com. Please click the link in the email and finish your registration within the next 3 days." There is a "Return To Login" button at the bottom.

- 9) You will receive a confirmation email with a link to complete the registration process, including setting up additional online authentication and your communication delivery preferences.



- 10) Once your registration is complete, you can access your historical account information and tax documents by logging into NetXInvestor and selecting the Communications tab.

If you have questions about registering for NetXInvestor or signing in and accessing your historical account information or tax documents, please review the FAQs below or call us at 1-855-622-0684. We're available Monday through Friday from 10 a.m. to 7 p.m. Eastern Time.

NetXInvestor Frequently Asked Questions

Q. When will the First Republic mobile app and firstrepublic.com website be decommissioned?

The grid below provides dates for when the app and certain features of the website will be decommissioned and how to continue to access investment account information and documents:

Website Features Decommission Dates	
December 12, 2024	<ul style="list-style-type: none"> • The First Republic Banking Online platform will be decommissioned. • After Banking Online is decommissioned on December 12, your investment account documents will only be available to access and download at www.netxinvestor.com. We encourage you to register with NetXInvestor prior to this date to ensure uninterrupted access to your account information.
October 15, 2024	<ul style="list-style-type: none"> • The Investing tab was removed from the First Republic Banking Online platform. • Between October 15 and December 12, you can access investment account information and documents: <ul style="list-style-type: none"> ○ Through First Republic Banking Online by clicking on the account from the Account Dashboard. ○ On Pershing Online Brokerage’s NetXInvestor site, www.netxinvestor.com, under the Communications tab. • Investment account balance(s) shown on the Account Dashboard will no longer be updated in real-time; they will reflect the previous business day’s market close balance.
September 12, 2024	<ul style="list-style-type: none"> • The First Republic mobile app was decommissioned.

To learn more about accessing and registering for NetXInvestor, please see the FAQ below titled, “How do I log into NetXInvestor to access my account information and documents,” or review the step-by-step instructions above.

If you have not already registered for NetXInvestor, we encourage you to do so before December 12, 2024, to ensure ongoing access to your account information.

Q. How do I log into NetXInvestor to access my account and tax information?

The grid below provides guidance on how you can continue to access your historical investment account information and tax documents on NetXInvestor.

If you currently:	Then:
Use the First Republic Banking Online tool to access your investment account(s)	Log in to www.netxinvestor.com . If you do not have or remember your NetXInvestor credentials, visit the NetXInvestor Registration Guide above for step-by-step instructions on how to register.
Do not have online access for your investment account(s)	Visit the NetXInvestor Registration Guide above for step-by-step instructions on how to register for NetXInvestor online access.
Use www.netxinvestor.com to access your investment account(s) online	Continue to log in with your existing ID and password. Your current online experience will remain unchanged.
Use the First Republic Brokerage Online tool to access your investment account(s)	Log in to www.netxinvestor.com to access your account(s) online. Log in using your existing ID and password and enter the code “33L” in the Financial Organization # field.

Once you have logged into NetXInvestor, you can find your historical account information and documents under the Communications tab. NetXInvestor will only store this documentation for your First Republic investment accounts.

Q. How do I access my account(s) that I have opened at JPMorgan Chase?

- Any assets that were transferred to J.P. Morgan can be accessed on J.P. Morgan OnlineSM and the J.P. Morgan Mobile[®] app¹. If you do not have an online profile and would like one, please visit jpmorgan.com/enroll, download the mobile app or contact your J.P. Morgan team.
- You will still need to use www.netxinvestor.com to review any First Republic account information and documentation that predate the transition of your assets.

Q. What if I forgot my User ID or need to reset my password?

If you have forgotten your User ID or need to reset your password, click on the blue Login button on the NetXInvestor home screen.

Towards the bottom of the “Login” pop-up window, you can select either “Forgot User ID?” or “Forgot Password?”

Login

Financial Organization # ⓘ
Enter First 3 characters of account #

User ID or email address
Enter user ID or email address

Password
Enter Password

Remember User ID

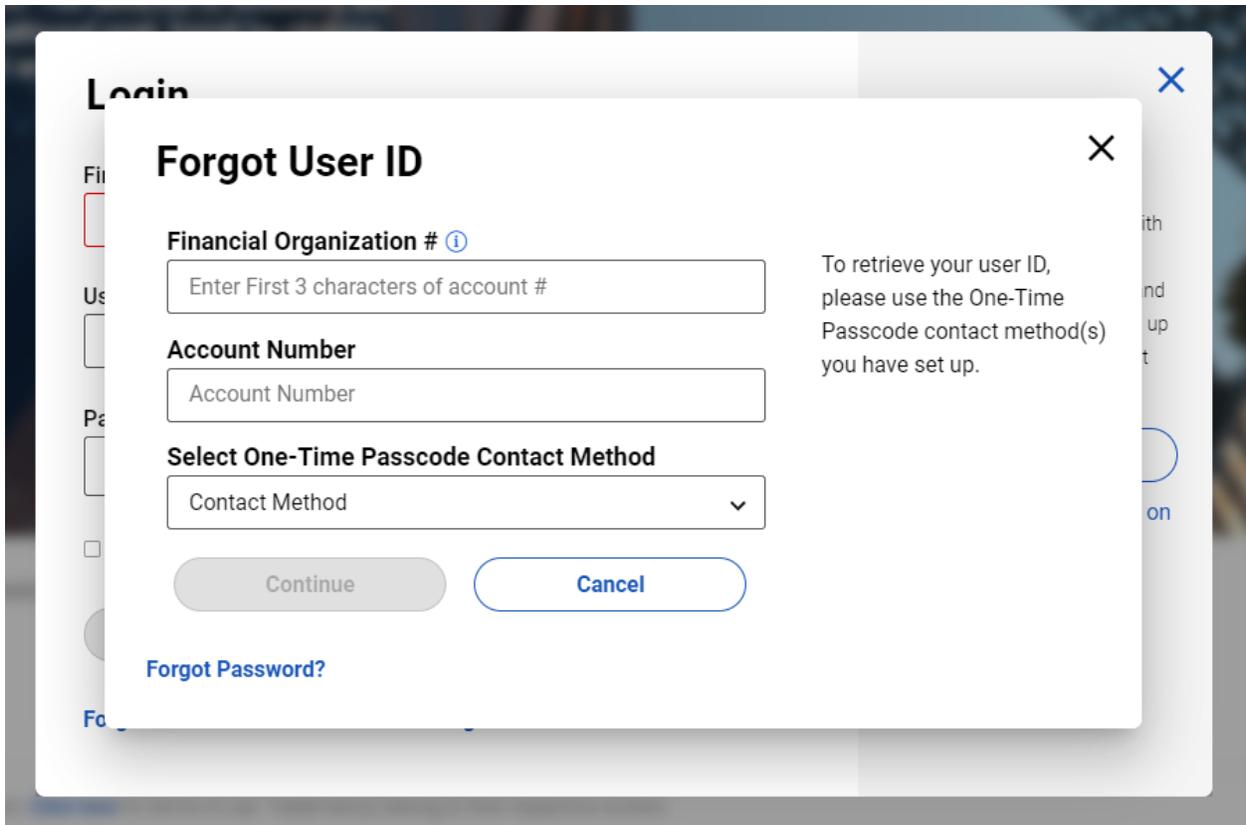
Login

[Forgot User ID?](#) [Forgot Password?](#)

First time user?
NetXInvestor provides you with online access to your investment accounts, night and day, seven days a week. Sign up today to access your account online.

[Get Started](#)
[Check firm's background on BrokerCheck](#)

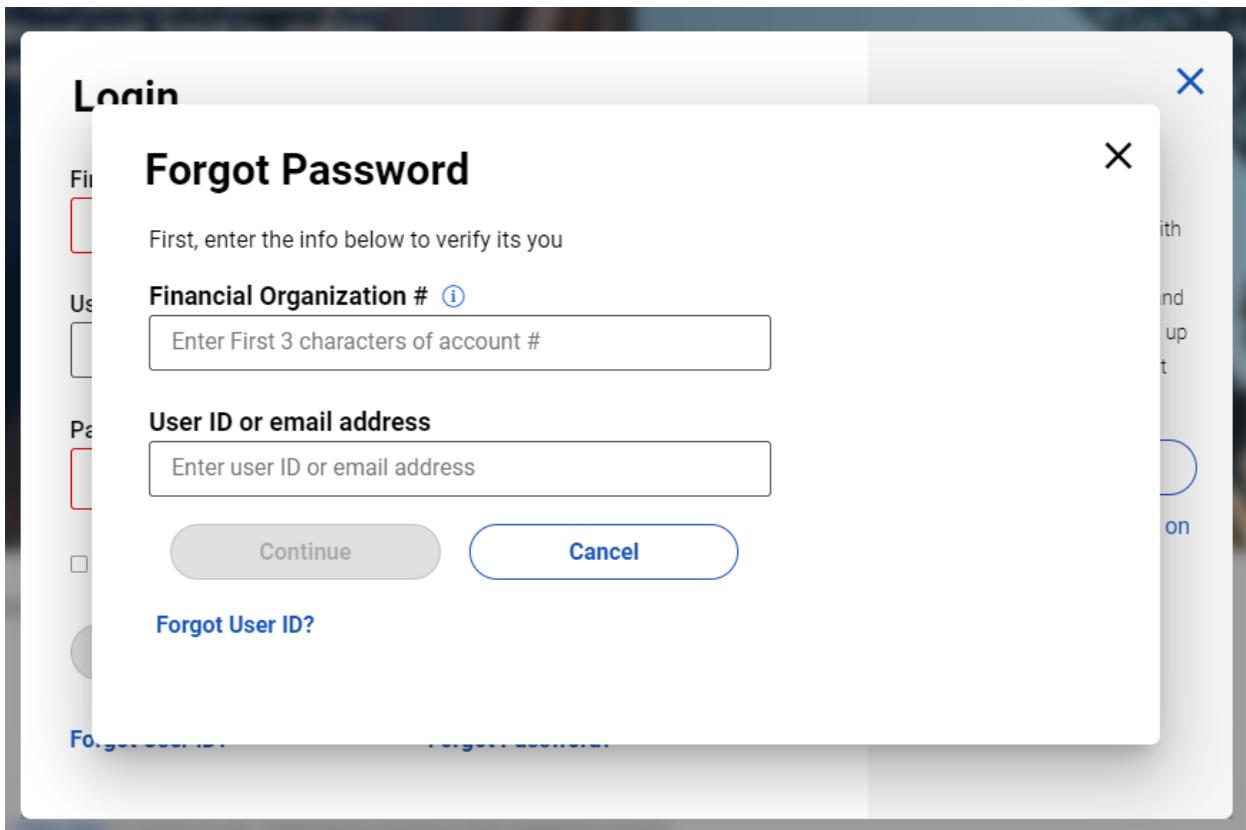
- 1) If you select “Forgot User ID?”, the Forgot User ID pop-up window will appear and ask you to provide:
 - Your Financial Organization #, which is “33L”
 - Your Account Number, which is the account number associated with the User ID you are trying to retrieve.
 - The One-Time Passcode method that you selected when you registered, either SMS/Text, Email or Voice (phone call).
 - After selecting your passcode method from the drop-down menu, you will be prompted to input the phone number or email address you provided during registration.
 - Then, select Continue to have the one-time passcode and further instructions sent to your phone or email to retrieve your User ID.



2) If you select “Forgot Password?”, the Forgot Password pop-up window will appear and ask you to provide:

- Your Financial Organization #, which is “33L”
- Your NetXInvestor User ID or the email address you used to register with NetXInvestor

Then, select the Continue button.



If you entered your User ID on the previous pop-up window, you will now be asked to enter either your account number or your email address that you used to register to further verify your identity.

Then select Continue.

Or, if you entered your email address on the previous pop-up window, you will be asked to now enter your account number to further verify your identity.

Then select Continue.

Next, you will be asked to select the method to receive a one-time passcode, either by SMS/Text, Email or Voice (phone call).

- After selecting your passcode method from the drop-down menu, you will be prompted to input the phone number or email address you provided during registration to receive the code.
- Then, select Send Code to have the one-time passcode delivered to your phone or email.
- Once you receive the passcode, enter it in the “Enter Code” field.
- Then select the Continue button.

The screenshot shows the 'One-Time Passcode' screen in the NetXInvestor app. At the top, the NetXInvestor logo and 'Español' language option are visible. The main heading is 'One-Time Passcode'. Below it, a message states: 'For your protection, we need to confirm your identity by sending you a One-time Passcode to the contact method you select below. [Tell me more](#)'. Under 'Select Contact Method', there is a dropdown menu currently set to 'Test Email by Email' and a blue 'Send Code' button. Below this, a text input field is labeled 'Enter Code'. A section titled 'Remember My Device (30 Days)' asks: 'Would you like to access J.P. Morgan Securities from this device in the future without the need for entering One-Time Passcode? You can choose to remember this device.' There is an unchecked checkbox for 'Remember My Device'. At the bottom, there are 'Continue' and 'Cancel' buttons. A small footer note reads: 'Text STOP to 75780 or 59422 to cancel | Text HELP to 75780 or 59422 for help or call 877-348-5576 | Message & data rates may apply: [SMS Terms & Conditions](#)'.

Next, you will be directed to enter a new password following the password rules on the right side of the screen. Once you have entered and confirmed your new password, select the Save button.

You can now use your new password to sign in to NetXInvestor.

The screenshot shows the 'Reset Password' screen in the NetXInvestor app. At the top, the NetXInvestor logo and 'Español' language option are visible. The main heading is 'Reset Password'. Below it, a message states: 'Enter a new password using Password Rules.' There are two text input fields: 'Enter New Password' and 'Confirm New Password'. To the right, under the heading 'Password Rules', there is a list of requirements:

- not contain same as the user Id
- contain a minimum of 8 and a maximum of 32 characters
- contain at least one alpha and one numeric character
- not contain linked account(s) name.
- not contain 3 repeating characters. For example, AAA222CCC
- not contain reversal of user Id
- contains at least one uppercase and one lowercase letter

Below the input fields, a 'Tip' states: 'Passwords can contain the following special characters: & * @ : \$ = ! - % . # ? _ |'. At the bottom, there are 'Save' and 'Cancel' buttons.

Q. What if I have other trouble logging in?

If you need further assistance with logging into the NetXInvestor site, such as help with your User ID and password, call us at 1-855-622-0684. We're available Monday through Friday from 10 a.m. to 7 p.m. Eastern Time.

Q. Where on the NetXInvestor site can I find account information and documents?

To access your account information and documents, select the Communications tab after you are logged in.

Q. What if I am having trouble being authenticated?

A. If you fail the identity verification process several times, you will be "locked out" for a period of time and will be restricted from retrying during that time. You can try again after the time restriction has passed, or if you need further authentication assistance, call us at 1-855-622-0684. We're available Monday through Friday from 10 a.m. to 7 p.m. Eastern Time.

Please note that the following individuals/accounts are not eligible to self-register on the NetXInvestor site at this time:

- Individuals without a Social Security number.
- Individuals with a Social Security number, but with a foreign address.
- Individuals whose Social Security number is not listed as primary on the account.
- Corporations, trusts and other entities with a Tax Identification Number.

Q. What if I don't have a Social Security number?

If you do not have a Social Security number, call us at 1-855-622-0684. We're available Monday through Friday from 10 a.m. to 7 p.m. Eastern Time.

¹ You can download the J.P. Morgan Mobile® app from the App Store or Google Play. App Store is a trademark of Apple Inc., registered in the United States and other countries. Android and Google Play are trademarks of Google Inc. Use of these trademarks is subject to Google Permissions. J.P. Morgan Mobile app is available for select mobile devices. Message and data rates may apply.

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