

# NetX360<sup>®</sup>+

*Introducing the next generation of our professional workstation*

## KEY BENEFITS

- Simpler views of information to get you what you need, faster
- Personalized experiences that support greater productivity and insights
- Access to relevant client information and on-demand learning to save time and enable faster platform adoption
- New dashboard homepage with curated content and analytics

NetX360+ represents an easier and more efficient way to work through our web-based professional workstation. With a reimagined experience, it provides access to all the necessary tools and information for advisors to manage their business, conduct research, perform transactions and better support their clients' needs.



**Simplified, Easy-to-Navigate Screens**



**Personalized Navigation and Analytics**



**Client Centric Views**



**Integrated Learning**



**Search with Machine Learning**

## ENHANCING THE EXPERIENCE

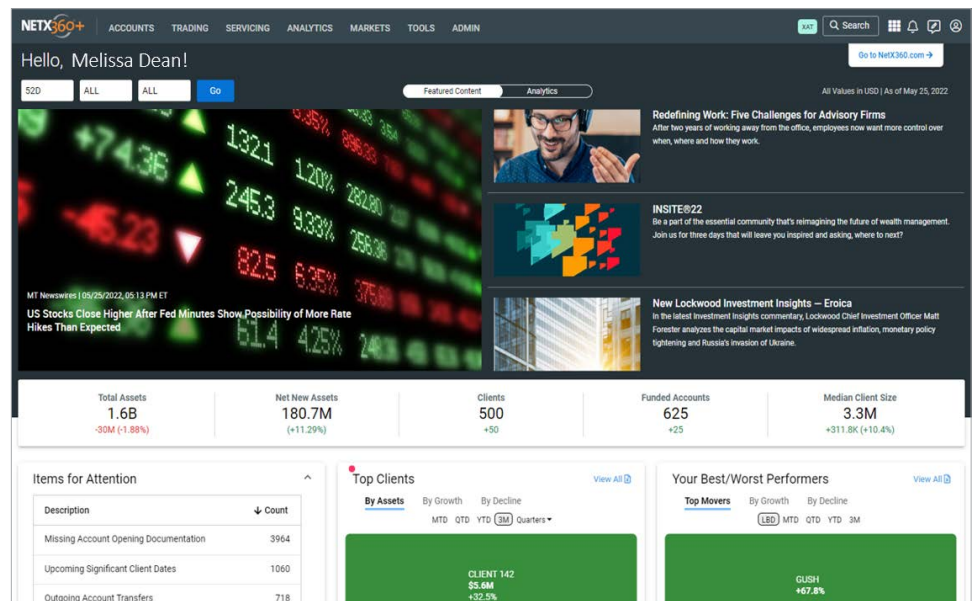
Advisors are always seeking better ways to enhance their relationships with their clients and thus need the ability to view entire client relationships. This more complex view can be difficult to provide, as a client can be a person, a family, multiple families, a corporation, an estate, etc.

As such, NetX360+ represents a critical shift from an account-centric approach to a client-centric vision of an advisor's business. It reflects not only client relationships with single accounts, but also clients with multiple parties grouped together by name and accounts for a more holistic view. Portfolio views also display common security types and asset classifications standardized from trusted third-party resources.

## GET STARTED

For existing users, go to [netx360plus.com](https://netx360plus.com) to access the new web-based experience.

**NETX360<sup>®</sup>+**

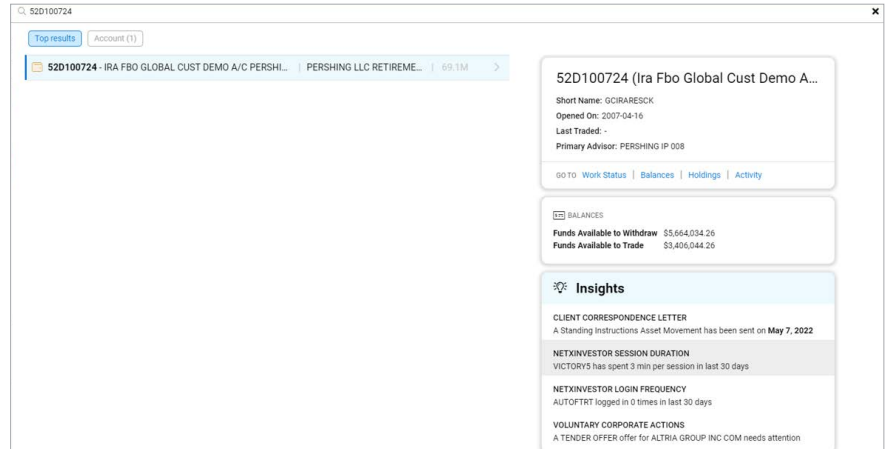


## SMARTER SEARCH

NetX360+ offers new and improved search capabilities to provide more robust, personalized search results to help you find what you need, faster. We've leveraged artificial intelligence to consolidate and prioritize insights that can lead to actions you may take to improve client experience. The insights suggest opportunities for actions you can take to deliver improved client service, financial solutions, and financial planning.

## ACCESS NETX360+ YOUR WAY

NetX360+'s adaptive design will provide a more consistent display of information across all of your devices, while one-time passcode functionality (allowing login validation from an unknown device) and a new biometric login for mobile access will help you work while on the go. The NetX360+ desktop app, a companion to the website, provides all the same functionality and allows users who prefer a desktop version of the experience to download the application on Windows or Mac devices.



### The new platform provides users access to all critical features from the existing NetX360 platform, including:

- Trading
- Asset Movements
- Reporting
- Client Onboarding
- Notifications
- Dashboard Insights
- Imaged Documents
- Work Corner
- Third-party Tools
- Intelligent Search
- Wealth Reporting and Insights

**Please contact us for more information on NetX360+.**

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