

# NETX PORTAL ACCESS

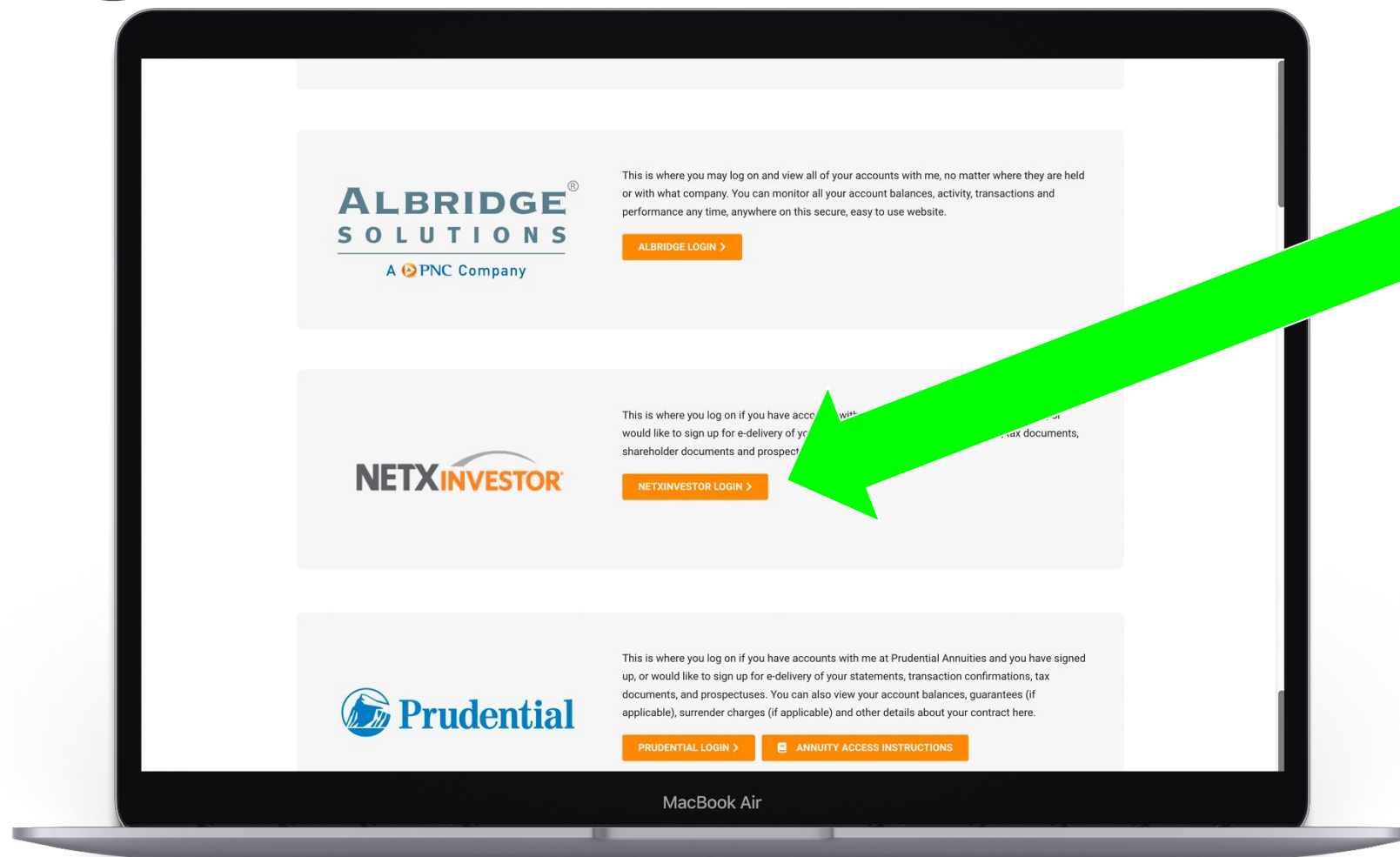
1

Visit [www.BaobabWealth.com](http://www.BaobabWealth.com) and  
click **CLIENT ACCESS** at the top.



2

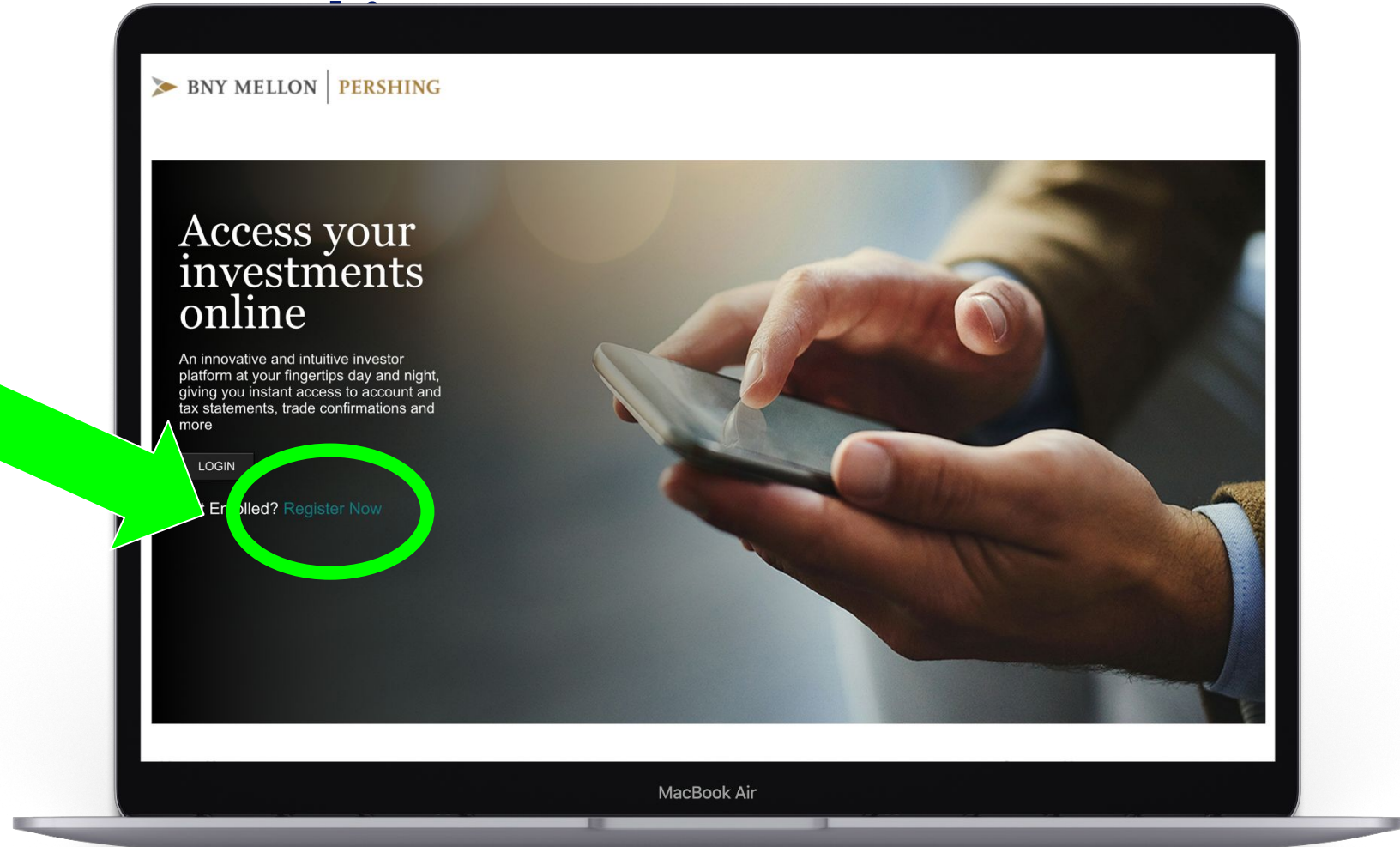
Click the new **NETX INVESTOR LOGIN** button.





3

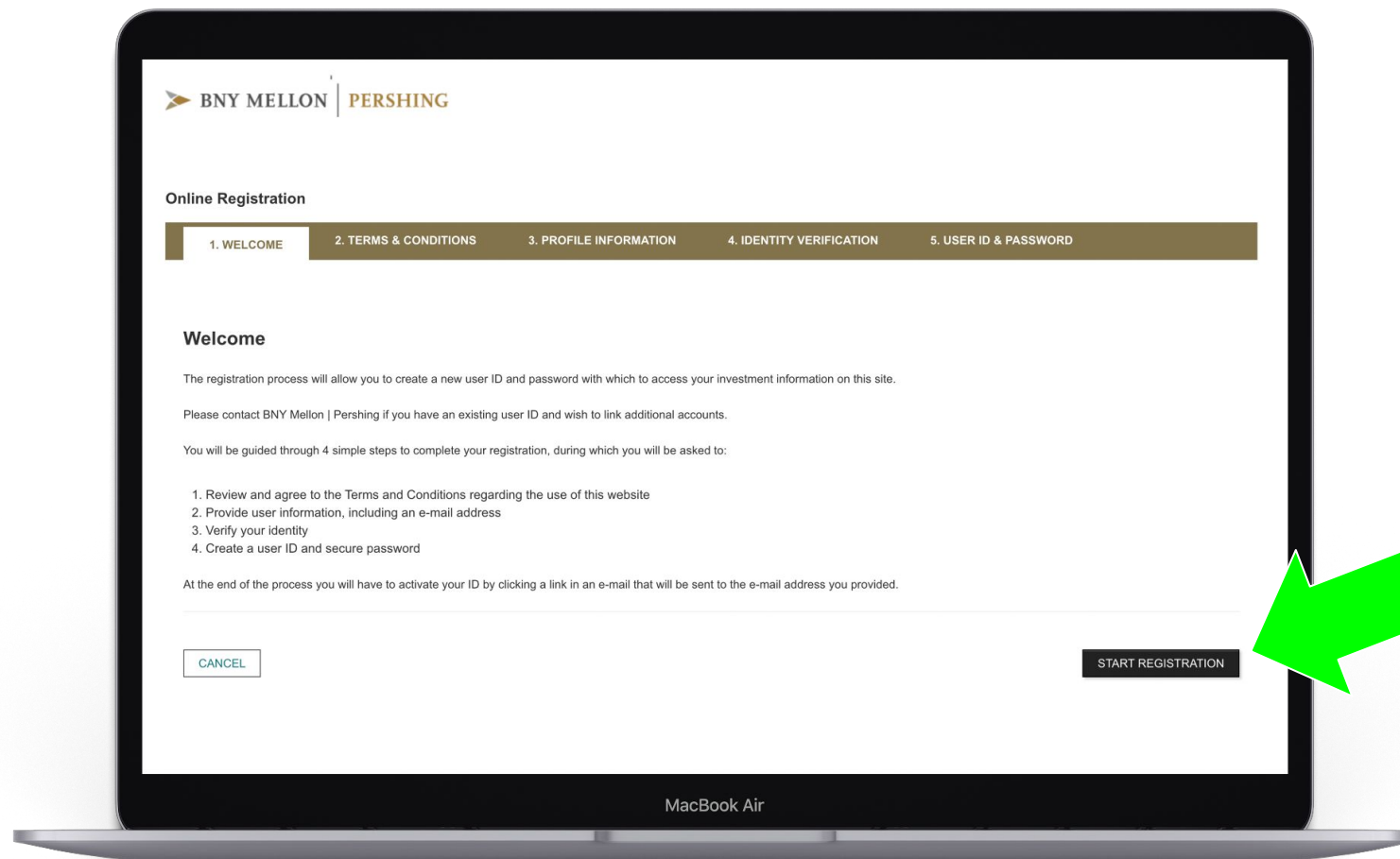
Click the **Register Now** button on the left part of the background





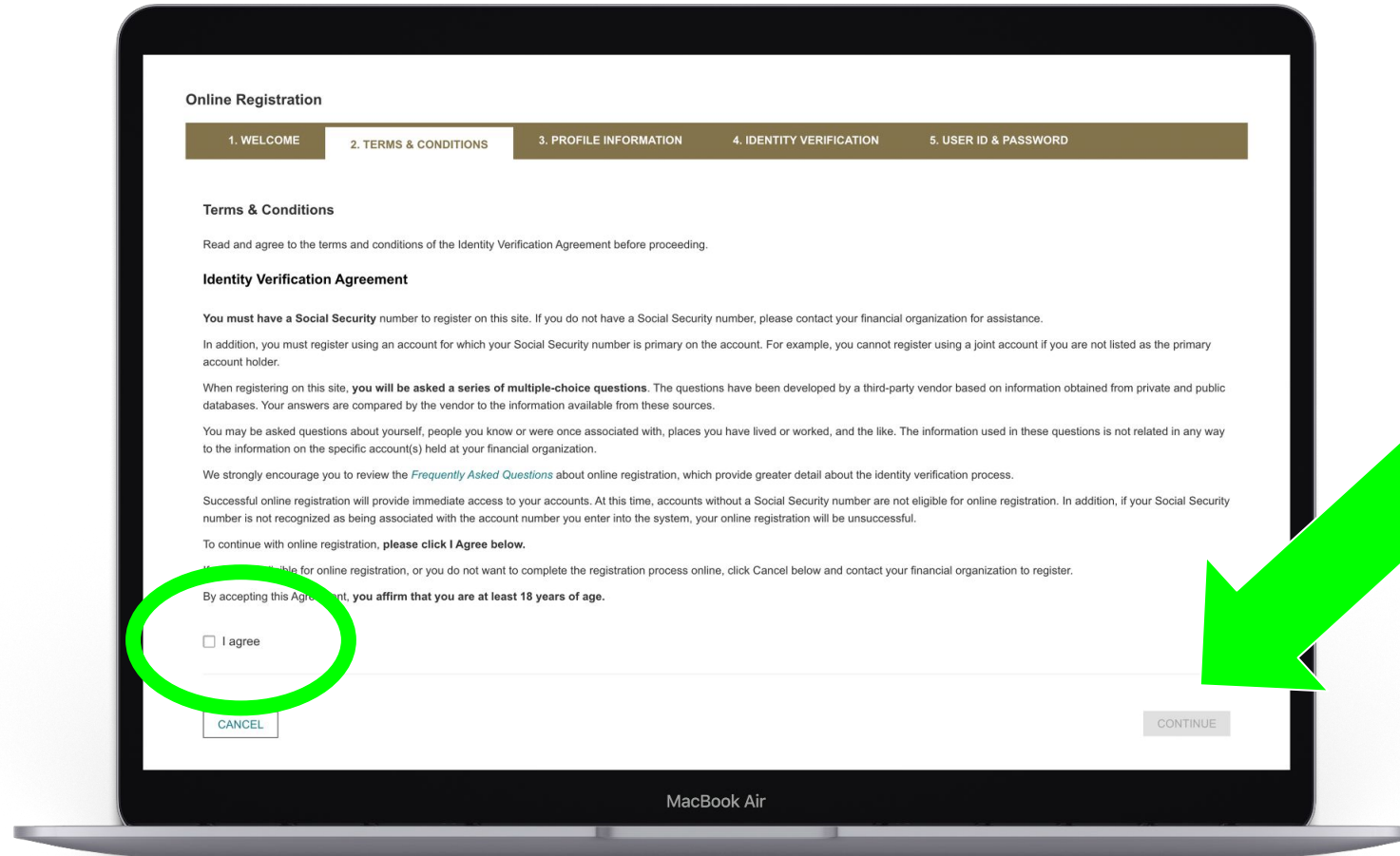
4

Click the **START REGISTRATION** button.



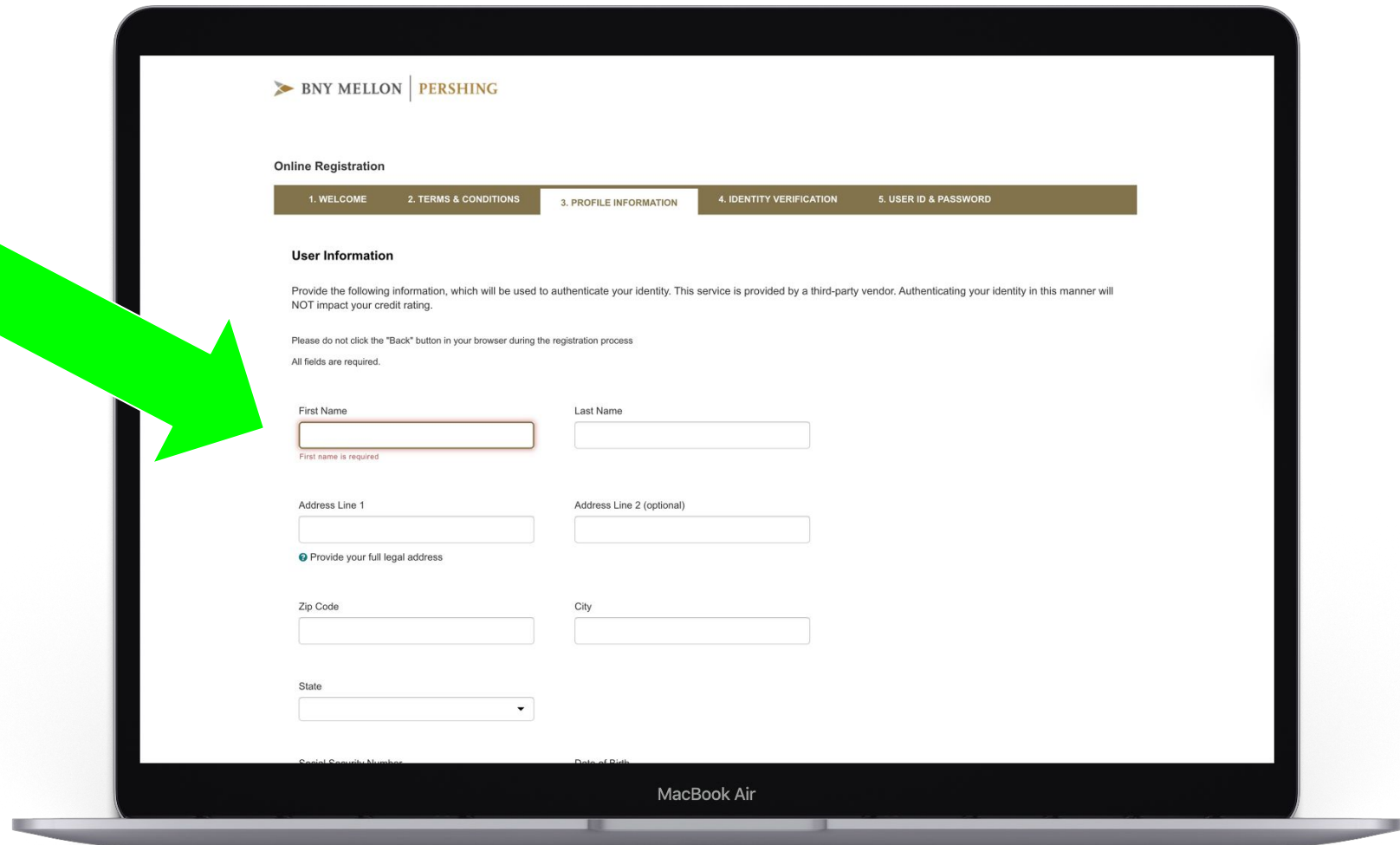
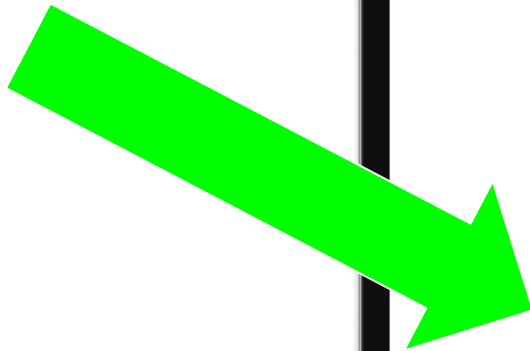
5

Click the **I agree** checkbox and then click **Continue.**

A screenshot of a laptop displaying the BAOBAB Online Registration page. The page has a dark header with the title "Online Registration" and a progress bar with five steps: 1. WELCOME, 2. TERMS & CONDITIONS, 3. PROFILE INFORMATION, 4. IDENTITY VERIFICATION, and 5. USER ID & PASSWORD. The "TERMS & CONDITIONS" step is currently active. Below the progress bar, the page is titled "Terms & Conditions" and "Identity Verification Agreement". It contains several paragraphs of text explaining the registration process, including requirements for a Social Security number and age. At the bottom of the page, there is a checkbox labeled "I agree" which is circled in green. To the right of the checkbox is a "CANCEL" button, and to the right of the "I agree" checkbox is a "CONTINUE" button. A large green arrow points from the right side of the screen towards the "I agree" checkbox and the "CONTINUE" button. The laptop is a MacBook Air, as indicated by the text at the bottom of the screen.

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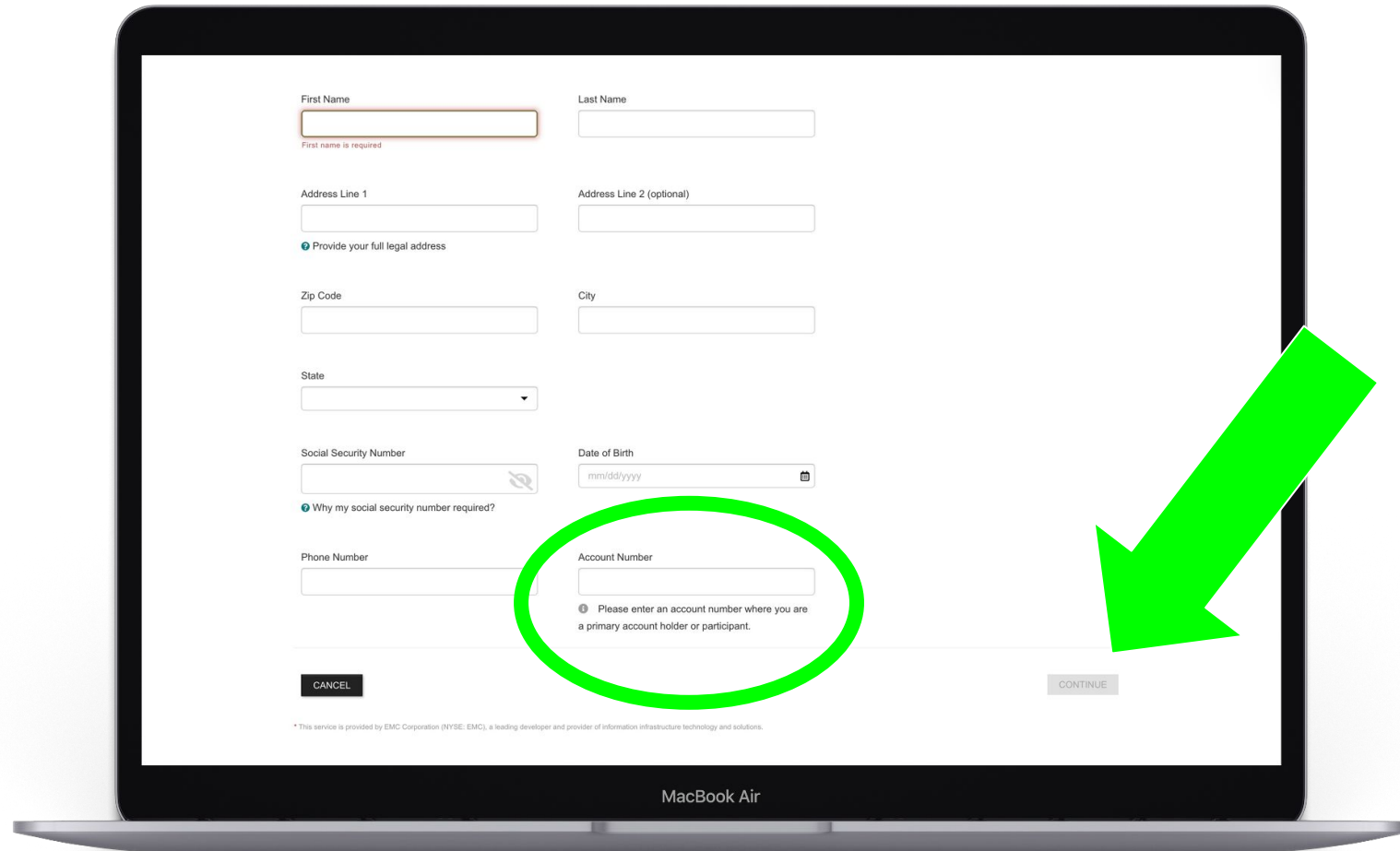
## Begin filling out the form with your profile information.

A laptop screen displays the 'Online Registration' form for BNY Mellon | PERSHING. The form is titled 'Online Registration' and includes a progress bar with five steps: 1. WELCOME, 2. TERMS & CONDITIONS, 3. PROFILE INFORMATION (currently active), 4. IDENTITY VERIFICATION, and 5. USER ID & PASSWORD. The 'User Information' section contains instructions and a warning about the 'Back' button. The form fields include: First Name (with a red border and error message 'First name is required'), Last Name, Address Line 1, Address Line 2 (optional), Zip Code, City, and State (a dropdown menu). The laptop is a MacBook Air, and the bottom of the screen shows the text 'MacBook Air'.



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As you continue filling out your profile information, you will come to the **Account Number** field. If you don't know your new **D7T#####** account number, please reach out to Jimmy. Then, click **Continue**.

A screenshot of a web form displayed on a MacBook Air screen. The form contains several input fields: First Name, Last Name, Address Line 1, Address Line 2 (optional), Zip Code, City, State (a dropdown menu), Social Security Number, Date of Birth, Phone Number, and Account Number. The 'Account Number' field is highlighted with a large green oval. A large green arrow points from the right side of the screen towards the 'Account Number' field. Below the 'Account Number' field, there is a small informational note: 'Please enter an account number where you are a primary account holder or participant.' At the bottom of the form, there are 'CANCEL' and 'CONTINUE' buttons. The laptop's brand name 'MacBook Air' is visible at the bottom of the screen.

First Name  
First name is required

Last Name

Address Line 1

Address Line 2 (optional)

Provide your full legal address

Zip Code

City

State

Social Security Number

Date of Birth  
mm/dd/yyyy

Why my social security number required?

Phone Number

Account Number

Please enter an account number where you are a primary account holder or participant.

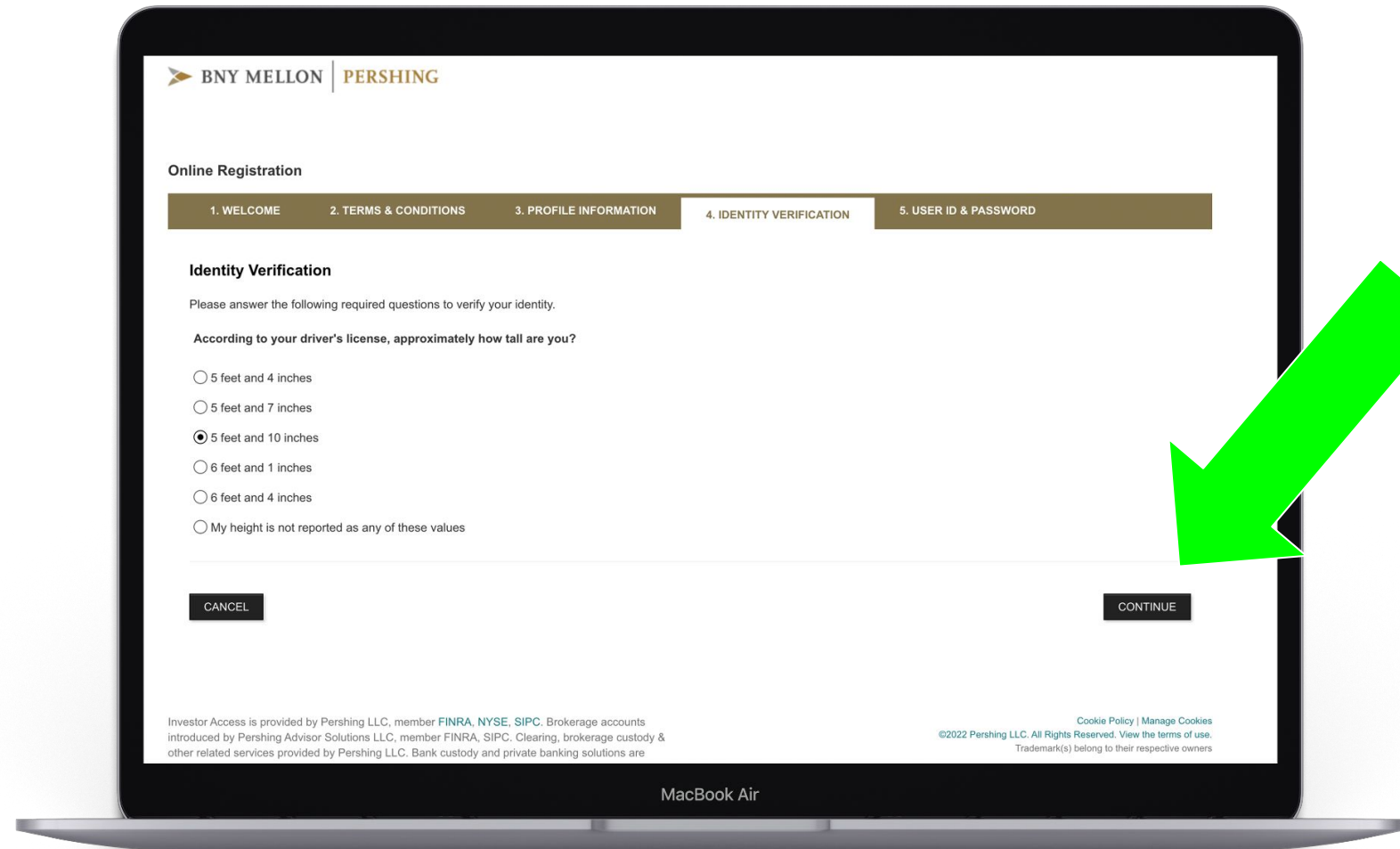
CANCEL CONTINUE

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

MacBook Air

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**Answer specific questions about yourself to verify your identity. Then, click Continue.**

A screenshot of a laptop displaying the BNY Mellon Pershing Online Registration Identity Verification screen. The screen shows a progress bar with five steps: 1. WELCOME, 2. TERMS & CONDITIONS, 3. PROFILE INFORMATION, 4. IDENTITY VERIFICATION (current step), and 5. USER ID & PASSWORD. Below the progress bar, the section is titled "Identity Verification" and asks the user to answer required questions to verify their identity. The first question is "According to your driver's license, approximately how tall are you?" with six radio button options: "5 feet and 4 inches", "5 feet and 7 inches", "5 feet and 10 inches" (selected), "6 feet and 1 inch", "6 feet and 4 inches", and "My height is not reported as any of these values". At the bottom of the form are "CANCEL" and "CONTINUE" buttons. A large green arrow points to the "CONTINUE" button. The laptop is a MacBook Air, and the footer contains legal disclaimers and copyright information for Pershing LLC.

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Online Registration

1. WELCOME 2. TERMS & CONDITIONS 3. PROFILE INFORMATION 4. IDENTITY VERIFICATION 5. USER ID & PASSWORD

**Identity Verification**

Please answer the following required questions to verify your identity.

According to your driver's license, approximately how tall are you?

☐ 5 feet and 4 inches

☐ 5 feet and 7 inches

☒ 5 feet and 10 inches

☐ 6 feet and 1 inch

☐ 6 feet and 4 inches

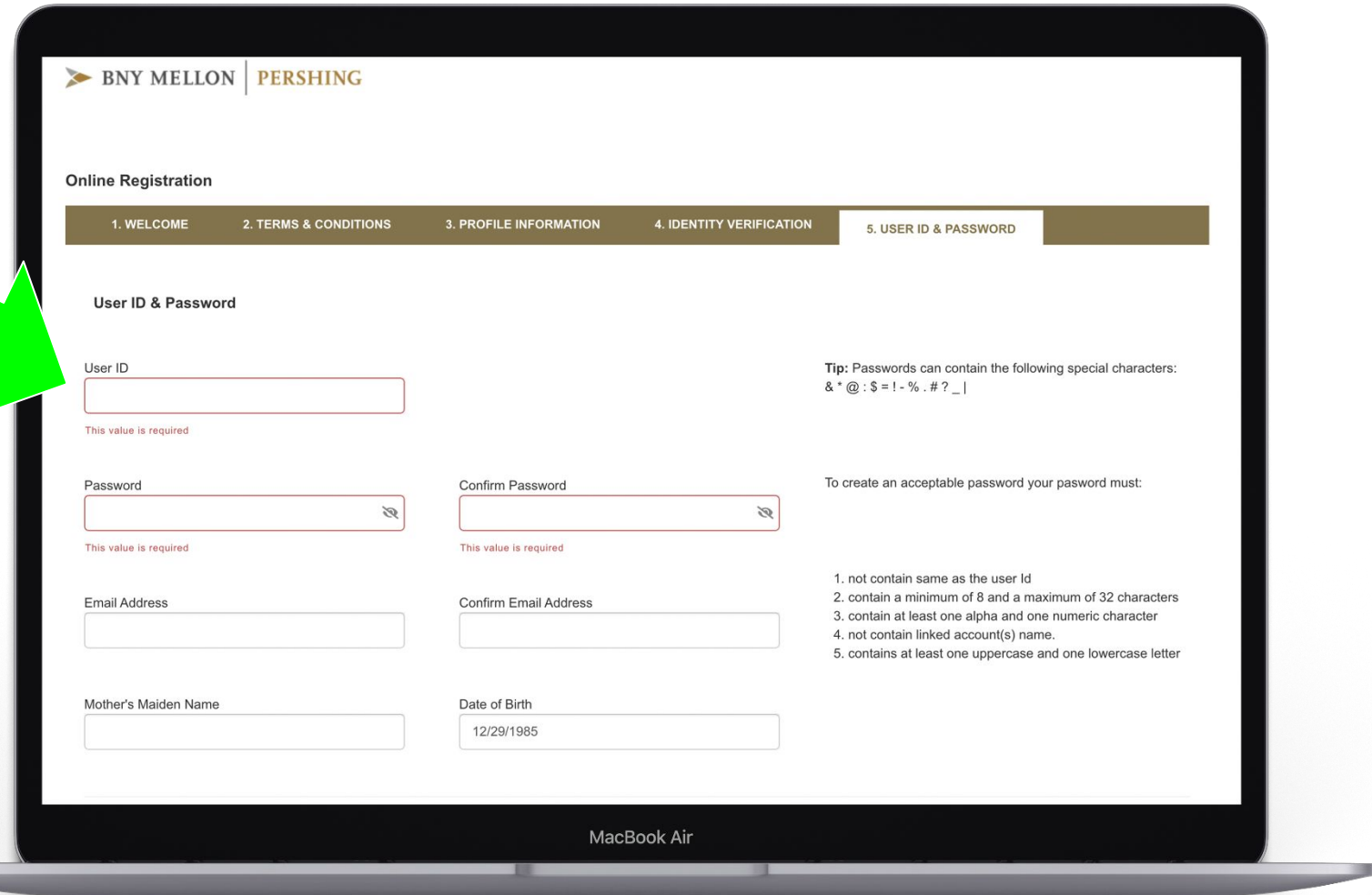
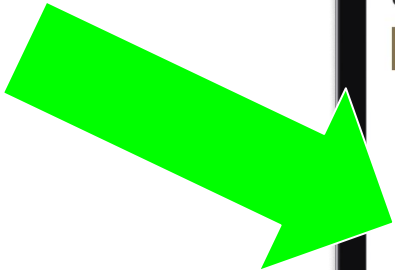
☐ My height is not reported as any of these values

CANCEL CONTINUE

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Create your **NEW** User ID and password. It cannot be the same as your old one. Then, click Continue.



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Online Registration

1. WELCOME 2. TERMS & CONDITIONS 3. PROFILE INFORMATION 4. IDENTITY VERIFICATION 5. USER ID & PASSWORD

User ID & Password

User ID  
  
This value is required

Tip: Passwords can contain the following special characters:  
& \* @ : \$ = ! - % . # ? \_ |

Password  
  
This value is required

Confirm Password  
  
This value is required

Email Address

Confirm Email Address

Mother's Maiden Name

Date of Birth

To create an acceptable password your password must:

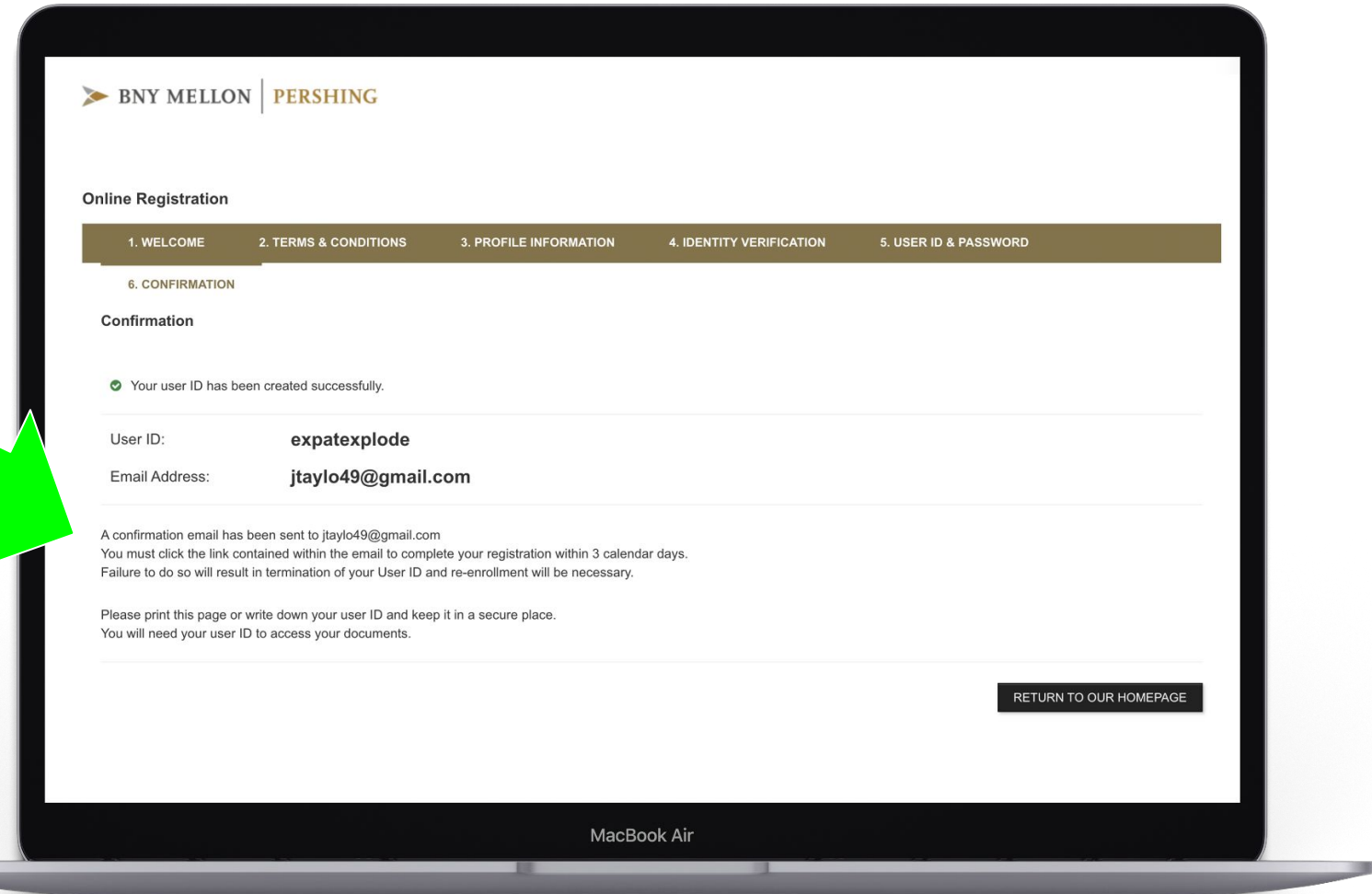
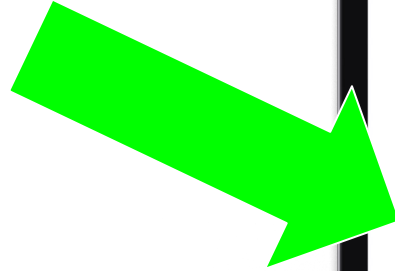
1. not contain same as the user Id
2. contain a minimum of 8 and a maximum of 32 characters
3. contain at least one alpha and one numeric character
4. not contain linked account(s) name.
5. contains at least one uppercase and one lowercase letter

MacBook Air



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**You will receive confirmation and be instructed to check your email for an email with a link.**



11

**The email subject is **Registration**. Click the link in the email to complete registration.**

Registration  Inbox x



edelivery@investor.pershing.com  
to JTAYLO49 ▾

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Thank you for visiting our Investor Portal, provided on behalf of your investment advisor by BNY Mellon | Pershing.

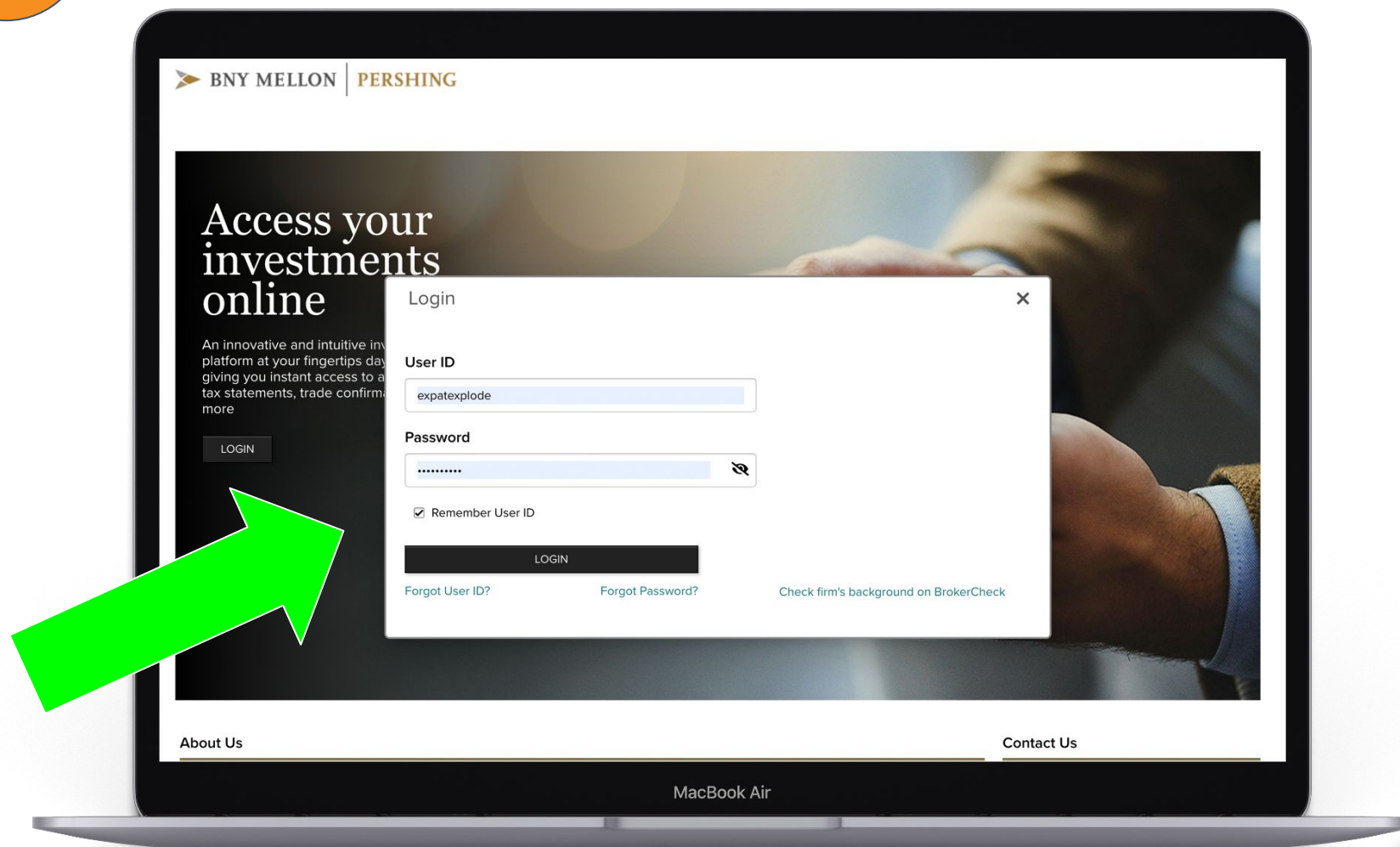
[Click here](#) to complete the registration process. Please have your user ID and password ready to complete your registration. Alternatively, you can cut and paste the link at the bottom of this e-mail to complete the registration.

If you need assistance accessing your documents, please contact BNY Mellon | Pershing at (877) 870-7230 from 9 a.m. - 6 p.m. (ET), Monday through Friday.

Please contact your investment advisor if you have questions about your account.

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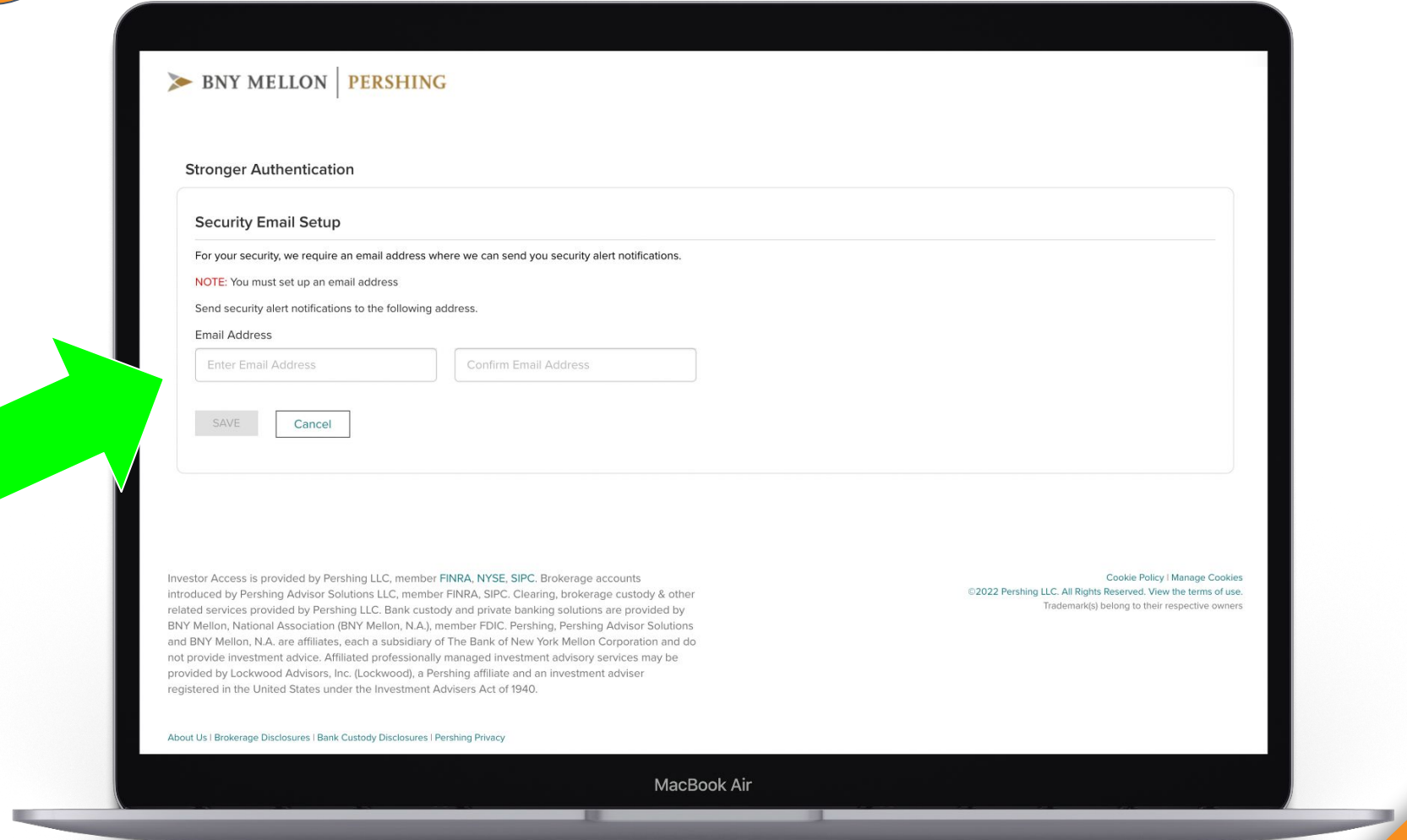
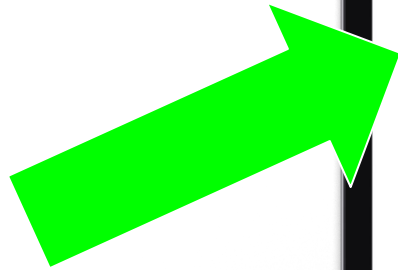
Log in with the **User ID** and **Password** you created in **Step 9**.





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## Type in your email address twice for **Security Email Setup**.



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### Stronger Authentication

#### Security Email Setup

For your security, we require an email address where we can send you security alert notifications.

**NOTE:** You must set up an email address

Send security alert notifications to the following address.

Email Address

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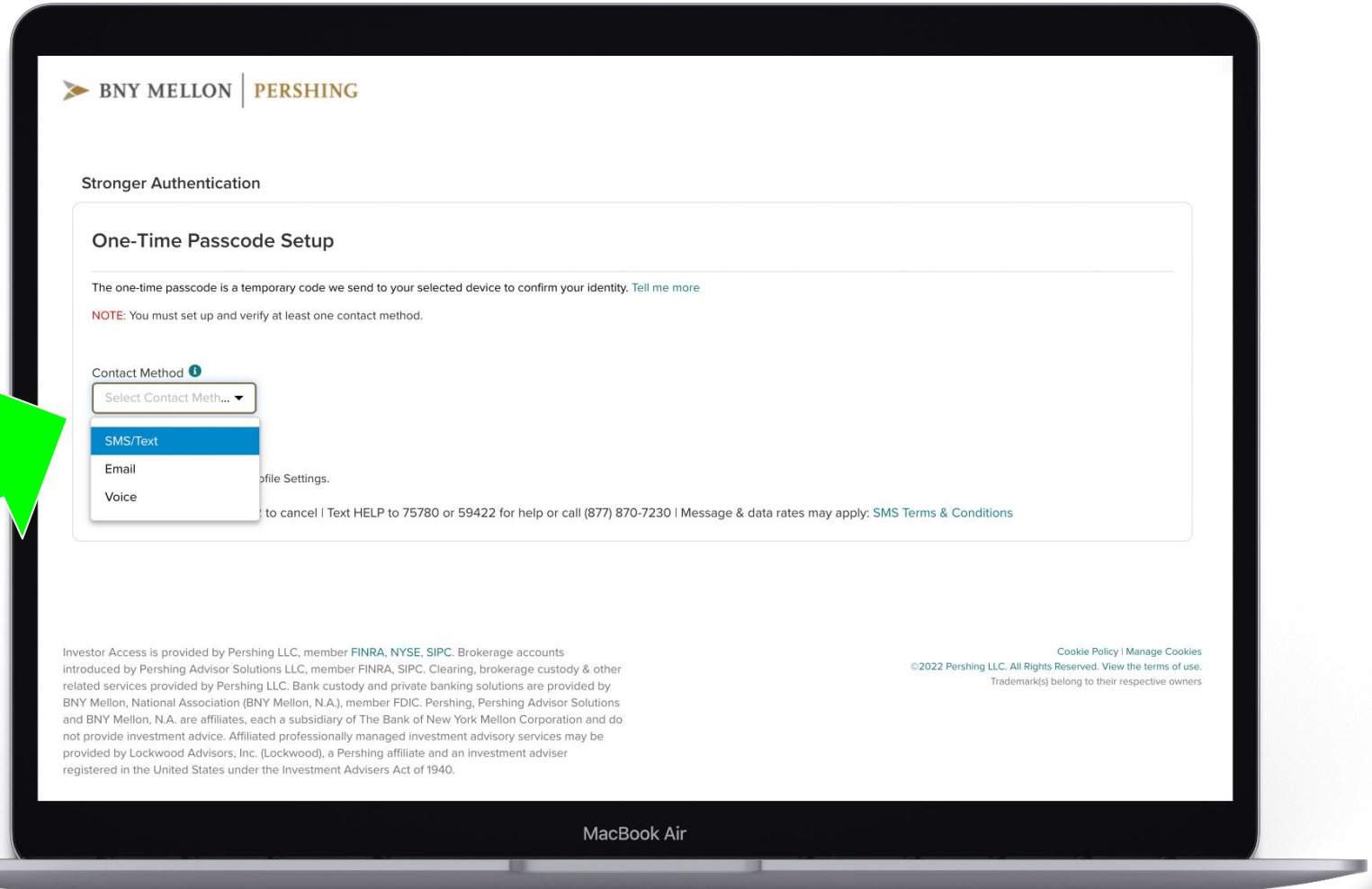
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MacBook Air

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## Choose a Contact Method for Passcode Setup.

A laptop screen displays the 'One-Time Passcode Setup' page from BNY Mellon Pershing. A large green arrow points to the 'Contact Method' dropdown menu, which is open and shows options: 'SMS/Text', 'Email', and 'Voice'. The page includes a 'Stronger Authentication' header, a 'One-Time Passcode Setup' section with explanatory text and a note, and a footer with legal disclaimers and copyright information.

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Stronger Authentication

One-Time Passcode Setup

The one-time passcode is a temporary code we send to your selected device to confirm your identity. [Tell me more](#)

**NOTE:** You must set up and verify at least one contact method.

Contact Method ⓘ

Select Contact Meth...

SMS/Text

Email

Voice

to cancel | Text HELP to 75780 or 59422 for help or call (877) 870-7230 | Message & data rates may apply; [SMS Terms & Conditions](#)

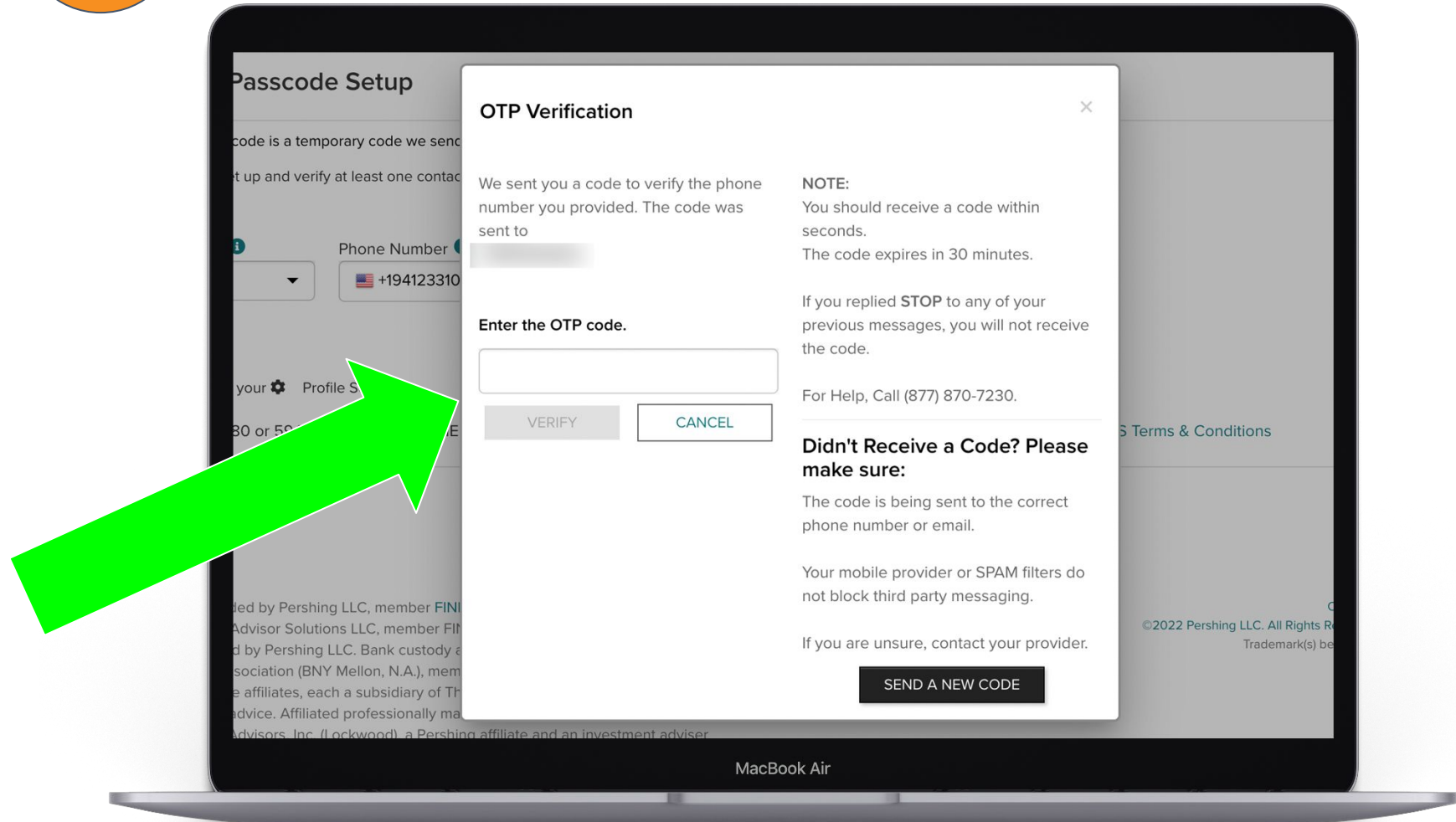
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MacBook Air

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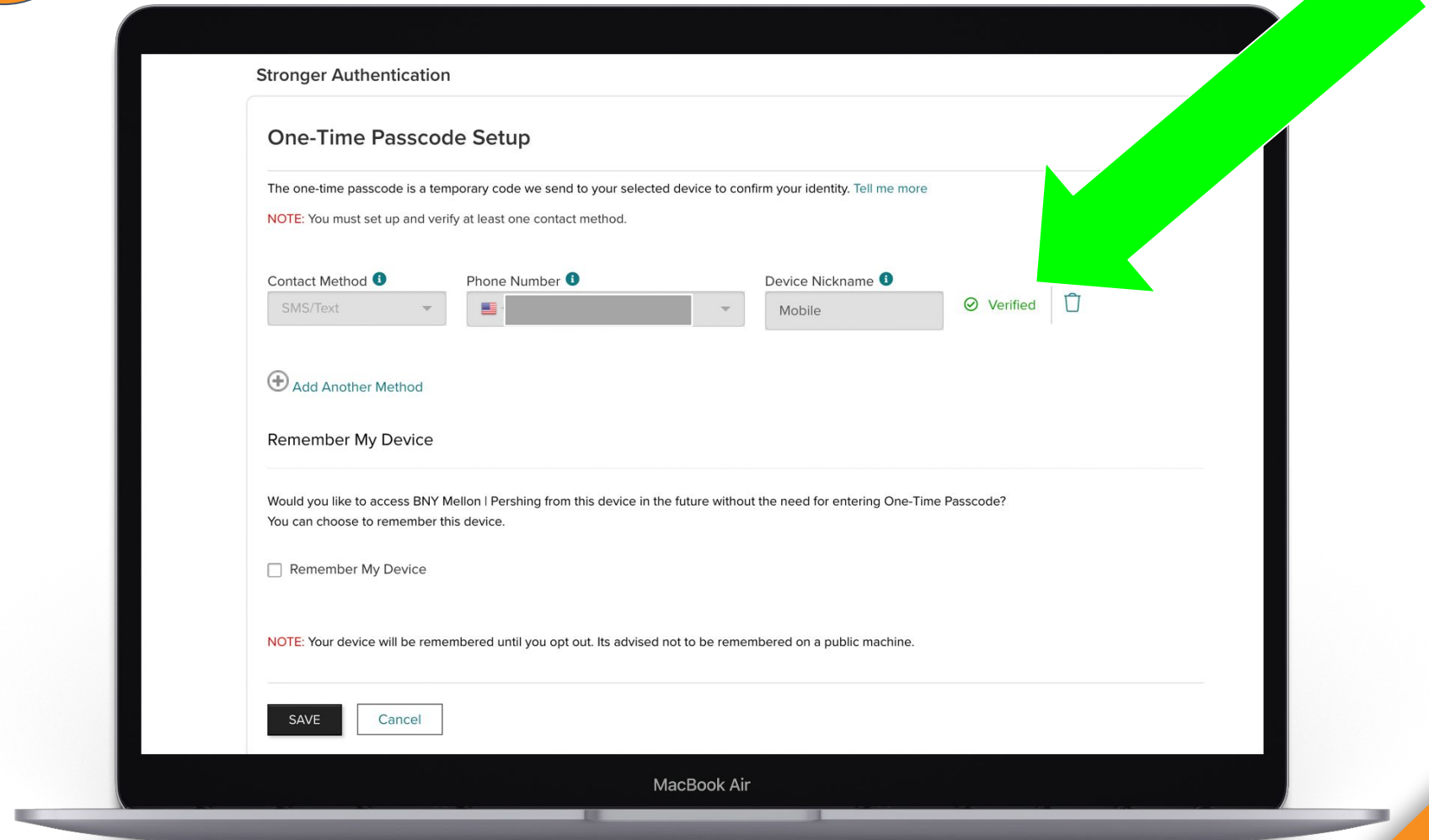
Enter the **One-Time code** you received via the method you chose in **Step 14**.





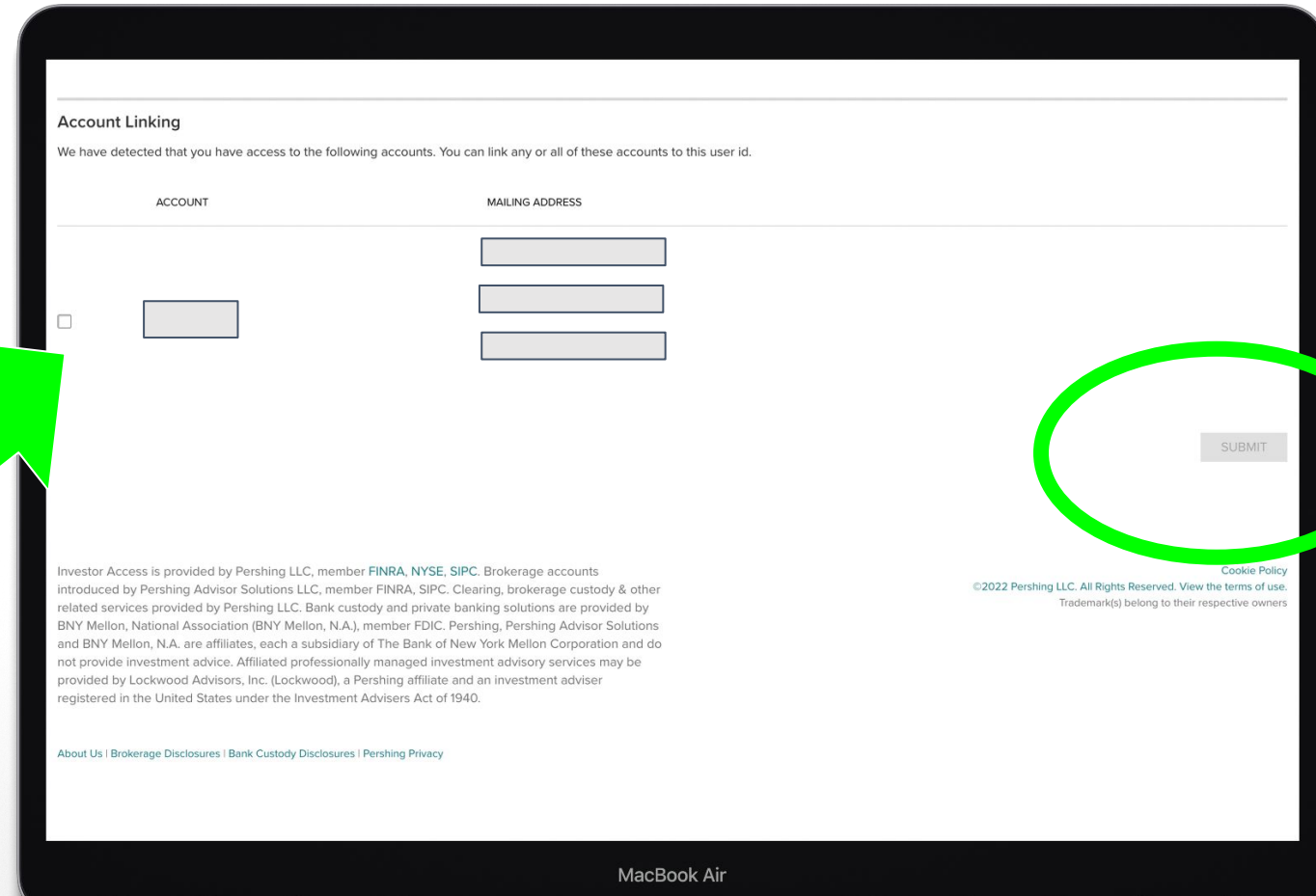
16

You will see that your **Contact Method** has been **Verified**.



17

Link your additional accounts by **checking the box** beside them and then click **Submit**.

A screenshot of a web application titled "Account Linking" displayed on a MacBook Air. The page has a white background with a thin grey border. At the top, the title "Account Linking" is followed by a message: "We have detected that you have access to the following accounts. You can link any or all of these accounts to this user id." Below this is a table with two columns: "ACCOUNT" and "MAILING ADDRESS". The "ACCOUNT" column contains a small square checkbox and a grey rectangular placeholder. The "MAILING ADDRESS" column contains three stacked grey rectangular placeholders. A large green arrow points from the left towards the checkbox. To the right of the table, a grey button labeled "SUBMIT" is circled in green. At the bottom of the page, there is a block of small text providing legal disclaimers and a "Cookie Policy" link. The MacBook Air's name is visible at the bottom center of the screen.

ACCOUNT	MAILING ADDRESS
<input type="checkbox"/>	

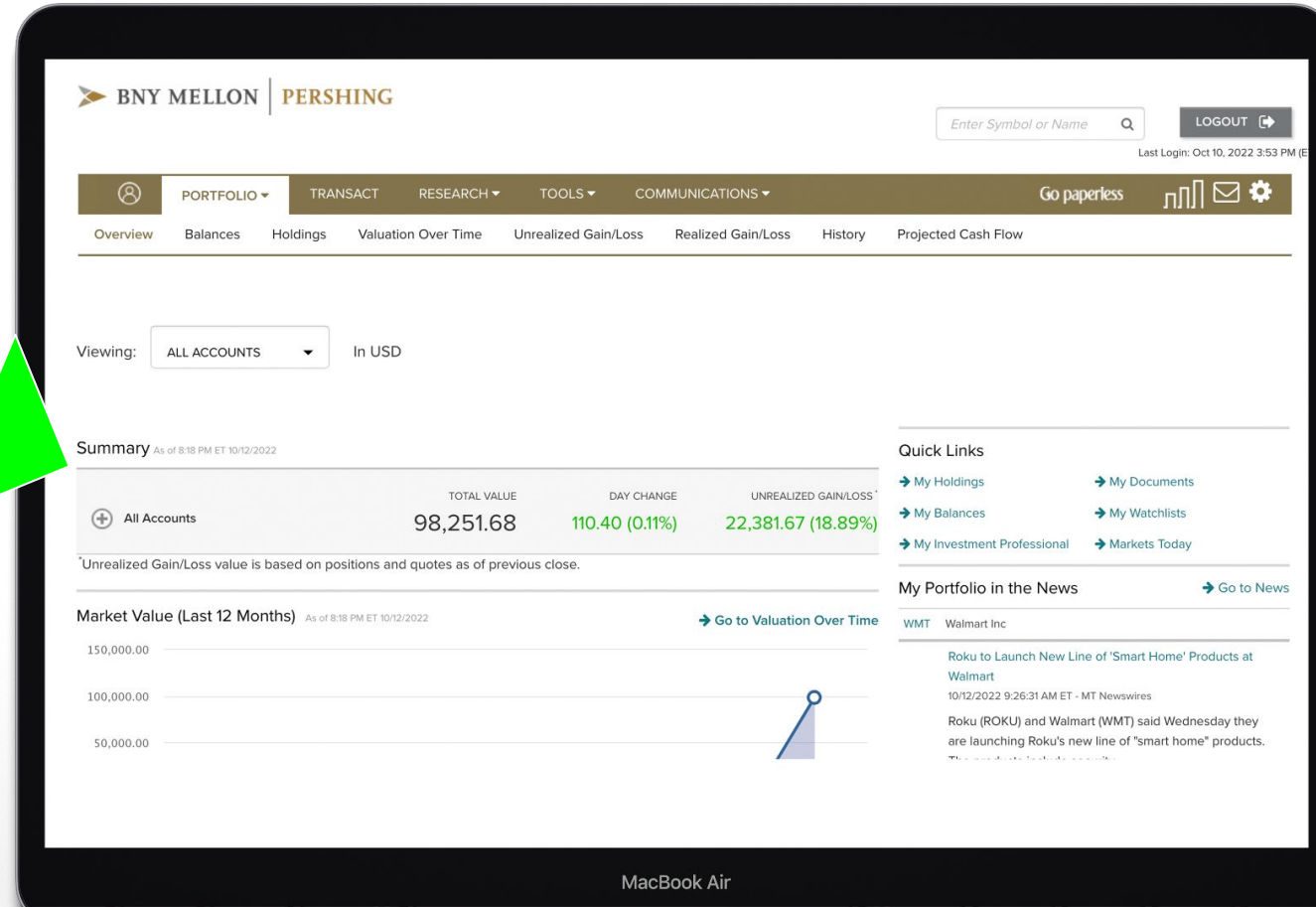
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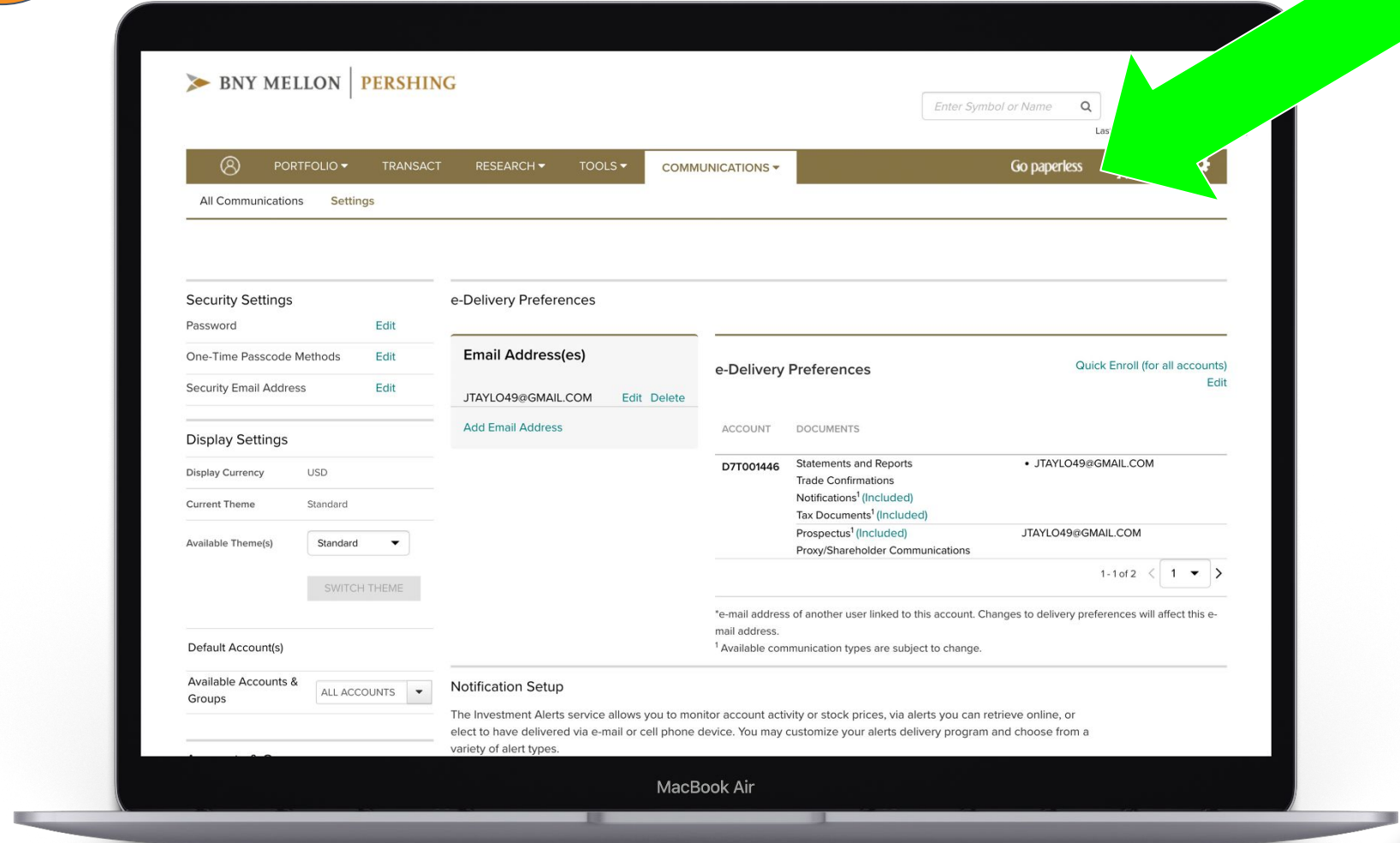
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You will then be taken to a screen with your Portfolio details.



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Click **Go Paperless** to turn on eDelivery for statements and other documents.



# Disclosures

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