



## ADIRONDACK FINANCIAL SERVICES

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### **Establishing online access to your Adirondack Financial Services Investment Accounts:**

In order to establish access to your account online you need to follow these simple steps:

1. Complete the NETEXCHANGE INVESTOR™ ID REQUEST form (page 2 of this document).
  - a. Complete Part 2 of the form if you wish to access account(s) in your name only.
  - b. Complete Parts 2 and 3 of the form if you wish to access account(s) with joint ownership. In the case of joint ownership, all owners must sign the form.
2. Submit completed, signed form to your Investment Advisor.
3. After 2-3 business days, you will have access to your account.

### **Viewing your Adirondack Financial Services Investment Accounts online:**

In order to view your account online:

1. Log on to the Adirondack Financial Services website at: [www.adkfinancialservices.com](http://www.adkfinancialservices.com).
2. Click on Client Services link in the upper right hand corner of the screen.
3. Click on the Client Login link: <https://www.netxinvestor.com/cgi/inet/home.trn> to access the login screen.
4. The **Financial Organization #** will be populated with the correct number (3CR).
5. Enter your **User ID** which is the first initial of your first name, the first initial of your middle name and your full last name. For example, for a person named John Thomas Brown, their User ID would be:  
jtbrown  
(Note that all letters will be in lower case.)
6. Enter your **Password**, which for first time users is the first two letters of your mother's maiden name, followed by your birthday in mmddyy format. For example, for a person with a mother's maiden name of Smith and a birthday of April 15, 1954, their User ID would be:  
Sm041554  
(Note that all letters will be in lower case.)
7. For first time users, you will complete the Security Setup Questions and the Security Setup Login Information where you will change your initial password.
8. Once this step is completed, you will have access to your accounts and will be able to navigate through the site to view your account information.

**Should you have any questions please call your Representative at  
315-724-4186 and they will be happy to assist you.**

# NETEXCHANGE INVESTOR™ ID REQUEST

INVESTMENT ADVISOR: \_\_\_\_\_

## I. INSTRUCTIONS

Please complete both pages of this form to obtain access to NetExchange Investor.

## II. ACCOUNT

Complete this section to link an account(s) with a NetExchange Investor ID(s). **NOTE:** This section is to be completed by the person using the ID. If the user is not designated on the account, then Section III will need to be completed as well.

LAST NAME / /	FIRST NAME	MIDDLE INITIAL
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DATE OF BIRTH (MM/DD/YYYY) (REQUIRED)	MOTHER'S MAIDEN NAME
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E-MAIL ADDRESS (E-MAIL ADDRESS FOR THE PERSON WHO IS ASKING TO HAVE THE ID CREATED, NOT THE ADVISOR)

ACCOUNT NAME: \_\_\_\_\_ ACCOUNT NUMBER:    -

ACCOUNT NAME: \_\_\_\_\_ ACCOUNT NUMBER:    -

ACCOUNT NAME: \_\_\_\_\_ ACCOUNT NUMBER:    -

INVESTMENT ADVISOR PRINT NAME	INVESTMENT ADVISOR SIGNATURE	DATE / /
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## III. THIRD-PARTY ACCESS

To be completed by the owner of the account to give third party access to the user in Section II or Section IV.

Please accept this as authorization for \_\_\_\_\_ to have access to view my personal account(s) via NetExchange Investor.

ACCOUNT OWNER PRINT NAME	ACCOUNT OWNER SIGNATURE	DATE / /
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JOINT ACCOUNT OWNER PRINT NAME	JOINT ACCOUNT OWNER SIGNATURE	DATE / /
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ACCOUNT NAME: \_\_\_\_\_ ACCOUNT NUMBER:    -

ACCOUNT NAME: \_\_\_\_\_ ACCOUNT NUMBER:    -

ACCOUNT NAME: \_\_\_\_\_ ACCOUNT NUMBER:    -

