



March 10, 2017

NetXInvestor[®] Security Simplified With Login and Passcode Change

The login page and process will change to streamline your clients' NetXInvestor[®] login experience and add more security. Additionally, we have enhanced the Identity Verification Code experience and it will be renamed One-Time Passcode (OTP). These enhancements are tentatively scheduled for March 30.

New Login Process

The User ID and Password fields will now appear together on the first login page. The user's NetXInvestor User ID and password remains the same; no updates are required.

Other enhancements include:

- New email alerts for the following steps help monitor activity:
 - User ID locked
 - Login from unrecognized device
 - Change of security email address
 - Change of password
 - Remember device

NOTE: These emails are sent each time a login occurs to an account. This e-mail can be triggered by third-party applications (e.g., personal financial management tools) that regularly obtain account data by logging in to the user's online investment account.

- Streamlined authentication process:
 - Removal of the security image and phrase set-up and validation
- Profile settings:
 - De-coupled edit features for one-time passcode set-up and security email address
- Help Desk contact under *Forgot User ID* feature—This information will be visible to assist users with recovering forgotten User IDs

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One-Time Passcode

The Identity Verification Code (IVC) function has been upgraded and renamed to One-Time Passcode (OTP). This function allows users to authenticate by sending a temporary code to a pre-registered device via text message, voice message or email to expedite the login process.

Enhancements include:

- One-time passcode setup:
 - Redesigned setup screen that guides users through steps to complete
 - Real-time device verification extended to voice and email contact methods
 - Warning checkpoint for user verification, if more than one device is added but not verified
 - Separate setup of security email address prior to one-time passcode setup
 - User-friendly terminology and informational texts, such as *Didn't Get a Code?*
 - Pre-population of key data entry fields, such as phone number and email address
 - One-time passcode retrieval:
 - Redesigned retrieval screen and passcode pop-ups
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Resources

These resources can help you navigate these security changes:

- [What's New in NetXInvestor?](#)
- [First Time Login Guide](#)
- [User Guide](#)
- [Frequently Asked Questions](#)

If you have any questions, please contact your Account Manager.