

Pershing Online Access Website Change FAQ

We are excited to announce enhancements that will simplify your online experience!

Concourse Financial Group Securities has been working with Pershing to create a single website and mobile app that will allow you to view all your brokerage and advisor accounts together.

We hope you find the following frequently asked questions helpful.

What capabilities will the new single website and mobile app have?

This new website and app will allow you to check account balances and activity, view statements, download tax documents, and access any other features available with online access.

How do I know if my accounts will be included?

Brokerage accounts that begin with a 5EQ and 5QM prefix are included, as are advisory accounts that begin with a TEO, WPC, BZO, BHM, BMG, and GEO.

How do I access this new website?

The new URL for the single client portal will be <https://concourse.netxinvestor.com>. This website will replace the current www.netxinvestor.com and/or <https://investor.pershing.com> website that you use today. The *Concourse Investor* mobile app will also replace *NetXInvestor* and *BNY Mellon-Pershing Access* mobile apps.

You can download the new mobile app from the Apple App Store or Android Play Store by searching for "Concourse Investor" and downloading the app. The mobile app will be available to download the week of June 17th.

Will my username and password change?

You will use your existing NetXInvestor and/or Investor Portal username and passwords to login to the new website and mobile app. If you have login credentials for both websites/mobile apps, please use the credentials associated with your accounts that begin with 5EQ or 5QM to view all your accounts together.

When can I start using the new website and mobile app?

The new website and mobile app will go live the weekend of June 22nd. However, you will still have access to the existing NetXInvestor and Investor Portal websites & mobile apps through July 31st. After July 31st, you will only be able to access your accounts online via the new Concourse Investor website and mobile app.

What if need help or have questions?

If you have any questions, please contact your Financial Professional or the CFGS Client Services Team at 1-800-288-3035, Option 1.

We hope this transition streamlines your experience and makes online access a little less complicated.