NetXSelect Client Enrollment Form Instructions
For Constellation Financial Advisors/Invest Clients

- Complete all highlighted sections on the attached form and provide your email address below.

  Email address: ______________________________

- Mail both forms to our office.

  Constellation Financial Advisors
  Attn: Cindy Cowman
  8601 LaSalle Rd., Ste. 202
  Towson, MD 21286

- In approximately 3-5 business days after we receive your request, you will receive an email from our office with instructions on how to obtain your Username and Password.

NetXSelect™ Client Enrollment Form

www.investfinancial.com | 8745 Henderson Road | Suite 300 | Tampa, FL | 33634

INVEST™ FINANCIAL CORPORATION

Name of Client (Primary)		
Date of Birth:	Client's Mother's Maiden Name (**Required**)	SSN
Name of Representative		Rep Code
What would you like the log-on ID to be? Indicate in order of preference. No more than 9 characters. 1st Preference:	2nd Preference:	3rd Preference:
New ID Add another account to ID:		Date

FAX THIS COMPLETED FORM TO (813) 890-6417.

Please list each individual account you would like to enroll, including the code for the type of account and the name on the account. Once the ID has been set up, a confirmation email will be sent to the representative letting them know that the NetXSelectTM Client enrollment has been completed. The representative will then instruct the client to contact INVEST Technology Support at 1-800-242-4732, option 1, option 3. The client will need their account number and will need to answer a few questions so that we can confirm their identity. Once their identity is confirmed, the client will be given the username and password for the NetXSelectTM Client site. Please allow 24 – 48 hours for processing.

Account Number (Please list primary account first)	**Type of Account** (Use account codes listed below)	**Client Name on Account** (Print the first initial and last name on account)

Account Category Codes

CLUB	Investment Club	ESTT	Estate	KUST	Custom Profile
COD	Receive / Deliver vs. Payment	EXMP	Exempt Organization	MISC	Miscellaneous (default category)
CORP	Corporation	FINL	Financial institution	NPRO	Non-Profit Organization
CPPS	Corporate Pension or Profit-Sharing Plan	GOVT	Government Entity/ Agency	PART	Partnership
CUST	Custodian	GRDN	Guardian / Conservatorship	RETE	Third Party as Custodian ERISA Account
DLJC	DLJSC Retirement Account – Simple	INDV	Individual	RETI	Third Party as Custodian
DLJI	DLJSC Retirement Account	INVA	Investment Advisor / Managed Account	SOLE	Sole Proprietorship
DKJP	DLJSC SEP Prototype and SARSEP	JNTN	Joint	TODI	Transfer on Death (Individual)
DLJQ	DLJSC Qualified Retirement Plan			TODJ	Transfer on Death (Joint)
DKJS	DLJSC Retirement Account SEP-IRA			TRST	Trust

The client's signature is required for all clients in the account. Minors are not required to sign unless it is an individual account in their name only.

Client's Name _______________ Client's Signature _______________

Client's Name _______________ Client's Signature _______________