



WOODBURY FINANCIAL SERVICES, INC.
Member NASD, SIPC, and Registered Investment Adviser
P.O. Box 64319
St. Paul, MN 55164-0319
(800) 800-2000
woodburyfinancial.com

Net Exchange Client application

- To view a demo, please go to www.netxclient.com and click on 'Portfolio Demo'.

Instructions:

- Complete the application.
- Remember to sign the completed application.
- Return the application to: Woodbury Financial Services, Inc.
Field Technology Support
P.O. Box 64284
St. Paul, MN 55164-0284
(800) 800-2000, extension 13170
Fax: (860) 392-5400

1	Account number(s)	List all account numbers and a description to help you differentiate between accounts once you are logged into NetExchange Client. (Example: IRA, Susan's individual)
	Account number	Description
	Account number	Description
	Account number	Description
	Account number	Description
2	User identification (ID)	The user ID must be between four and ten characters long. Do not provide an ID for each account: all accounts listed above will be linked to the same ID. You will be notified which ID was selected, or indication of any changes, if necessary.
	Potential user ID	Potential user ID
3	Account information	Please complete all fields.
	Name	Date of birth
	Address	Social security number
	City State Zip	Mother's maiden name (for password)
	e-mail address	
	How would you like to be notified of your user ID and password? ☐ Mail ☐ E-mail	
	• Please allow 5 business days to process.	
4	Signatures	All account owners must sign below.
	Signature	Signature
	Representative name	Trade desk number Representative number