PRIVATE CLIENT SERVICES™
MEMBER FINRA, SIPC
A Registered Investment Advisor

Advisor Office Training Opportunities

Course Catalog

Live, Instructor-Led Training	Content Description	Session Length	Instructor
NetX360 Basics			
NetX360 QuickStart	This session will demonstrate how to download and navigate Pershing's NetX360 platform, in addition to customization of pages and viewing client accounts and notifications.	60 minutes	Lorna Hill
NetX360 Best Practices	Learn how to proactively and efficiently follow up on investor accounts with just a few clicks of the mouse.	45 minutes	Lorna Hill
Money Movement			
NetX360 Asset Movement - Part 1	Learn to process ad hoc checks, journals, fed fund wires and ACH requests, as well as review the status and history of requests.	60 minutes	Lorna Hill
NetX360 Asset Movement - Part 2	Creating standing and periodic instructions, in addition to uploading documents will be covered in this session.	60 minutes	Lorna Hill
NetX360 Beyond Basics			
NetX360 Items for Attention	Learn how to view and respond to notifications that impact client accounts, such as incoming account transfers, corporate actions and more.	60 minutes	Lorna Hill
NetX360 Reporting	Discover the latest reporting and analytical capabilities using Report Center, the main reporting hub in NetX360. This course reviews how to access and build customized reports using a powerful report-building wizard. It also includes the best methods to search, view, print, schedule and save reports.	30 minutes	Lorna Hill
NetX360 Cost Basis	This course will assist with understanding the numerous NetX360 enhancements introduced to comply with Cost Basis regulatory requirements. It will provide an overview of the 2008 Economic Stabilization Act and how it impacts clients and their transactions. YLearn how to edit tax lot functionality, browse disposition methods at the account and security levels as well as monitor wash sale activity prior to settlement date.	45 minutes	Lorna Hill
NetX360 Order Entry	Learn the basics of navigating the equity and mutual fund order screens, setting trade defaults, entering orders, calculating commissions and reviewing orders.	30 minutes	Lorna Hill
NetX360 Customizing Your Workstation	This session will demonstrate how to customize Home Page Dashboards, Alerts, Trade Defaults, screens and more. Everything to help make your work day more productive.	60 minutes	Lorna Hill
NetXInvestor Client Experience	This course will provide examples of the NetXInvestor website to help you better understand the client experience.	30 minutes	Lorna Hill