



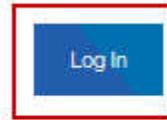
End client set up in Apex Online

01/04/2017

Accessing Apex Online

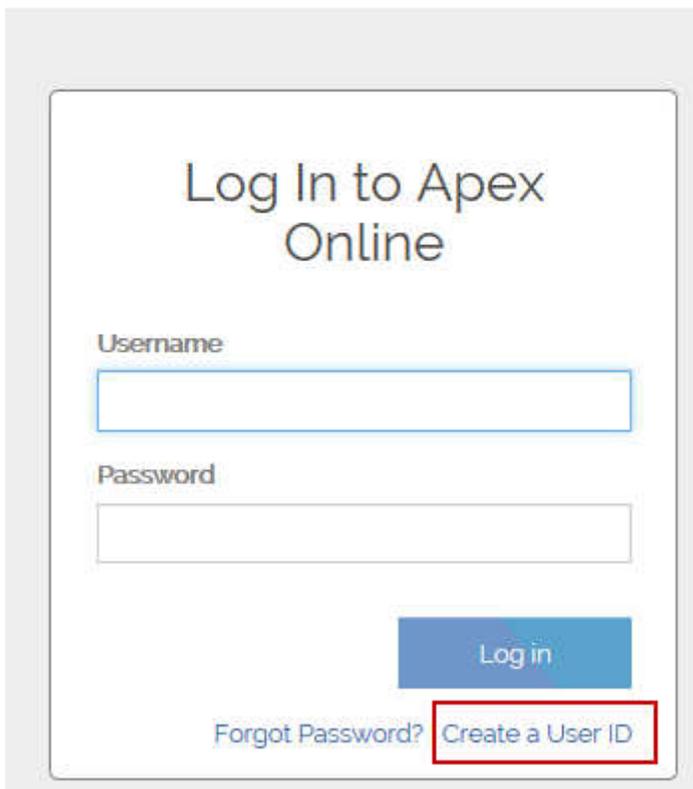
Apex Online can be accessed via the following URL: www.apexclearing.com

To create your ID, click Log In in the top right corner.



You will be directed to the Log In To Apex Online screen. Below the Log in button, click "Create a User ID".

APEX | Clearing™

A screenshot of the "Log In to Apex Online" login page. The page has a light gray background. At the top, the text "Log In to Apex Online" is displayed in a large, dark font. Below this, there are two input fields: "Username" and "Password". The "Username" field is a white rectangle with a blue border. The "Password" field is a white rectangle with a gray border. Below the input fields, there is a blue button with the text "Log in" in white. At the bottom of the form, there are two links: "Forgot Password?" and "Create a User ID". The "Create a User ID" link is highlighted with a red border.

This will bring you into the New User ID Setup Screen. If you are an end client, click NEXT. *If you are a broker, please request access by emailing CS@apexclearing.com* (You MUST be on the contact sheet to request access. If you are not on the contact sheet, please have someone from your firm who is on the contact sheet submit the request.)

• New User ID Setup •

Note

If you are a Broker, please contact your representative at Apex for assistance.

If you are a **Client** requesting to setup a User ID, please continue.

Step 1

Change the "Firm" dropdown to 10-Apex Clearing Corporation and enter your account number in the account number field with no dashes and click next.

• New User ID Setup •

Step 1

Firm
10-Apex Clearing Corporation ▼

Account Number
9YY05076 × *

Step 2

Type in the SSN or Tax ID associated with the account with no dashes and click next.

• New User ID Setup •

Step 2

To verify your identity, please enter the Tax ID Number for this account.

Account Number 10-9YY05076

Tax ID Number

Please enter your 9 digit Tax ID without dashes.

Step 3

Enter a valid email address. This will be used for password resets. Hit enter.

• New User ID Setup •

Step 3

Please provide a current E-mail Address.

Account Number 10-9YY05076

E-mail Address

Please enter a valid e-mail address.

Step 4

Select and answer the secret question. This will be used for security validation. Hit enter.

• New User ID Setup •

Step 4

Please select a question to be asked if you forget your password.
The answer will be required in order to have your password reset.

Account Number 10-9YY05076

Secret Question

Secret Answer x

Please Select

What is your mother's maiden name?

What is your secret word?

What is your place of birth?

What is your pet's name?

What is your favorite vacation spot?

Step 5

Enter the User ID and password you would like to have. Passwords must be at least 8 characters in length and contain at least 1 lower case letter, 1 upper case letter, 1 digit and 1 special character (e.g. !@#\$%^&*~|?). Click Finish.

• New User ID Setup •

Step 5

Select a new User ID and Password.

Account Number 10-9YY05076

User ID
Please enter a User ID (alphanumeric; minimum length of 6).

Password
Passwords must be at least 8 characters in length and contain at least 1 lower case letter, 1 upper case letter, 1 digit and 1 special character (e.g. !@#\$%^&*~|?).

Confirm Password

You should then get to the New User ID Setup page stating that the User ID has been created successfully. Click the "Click Here to Start Now!".

• New User ID Setup •

The User ID has been created successfully!

Account Number 10-9YY05076
User ID FILastname
Email Address User@apexclearing.com

Please use this User ID and the password you provided when logging on in the future.

[Click Here to Start Now!](#)

When you "Click Here to Start Now!", you will be brought into the account summary screen. From there, you can drill into further details by clicking on the orange buttons. Statements, confirms and tax documents can be viewed by clicking on the Documents tab on the top right.

APEX CLEARING Accounts Logout

Account #, Name, or SSN * Process Date

Enter at least 3 letters, numbers, or spaces.

SUMMARY | **9YY05076 (Margin) Test Account** [Documents](#)

Account Equity	Amount Available to Withdraw	Buying Power
\$0.00	\$0.00	\$0.00

Customer Information [Customer Information Details](#)

Correspondent	Apex Clearing Corp - Firm Accounts
Name & Address	Test Account 350 N. St. Paul St. 1300 Dallas, TX 75201
Account Registration	INDIVIDUAL
Home Phone	111-222-3333
Email Address	MTREAT@APEXCLEARING.COM
Account Status	Closed
Rep. Code	000
Tax ID	xxx-xx-7453

Balances

Type	Trade	Settled
Totals	\$0.00	\$0.00

Positions [Positions Details](#)

There are no positions.

All values in USD equivalent.

Margin [Balance Details](#)

S.M.A.	\$0.00
Margin Excess	\$0.00
Day Trade Buying Power	\$0.00

All values in USD equivalent.

Activity [Activity Details](#)

No activity between Jan 3, 2017 and Jan 4, 2017.

All values in USD equivalent.