

APEX | Clearing™

End Client Set-Up in APEX Online User Guide

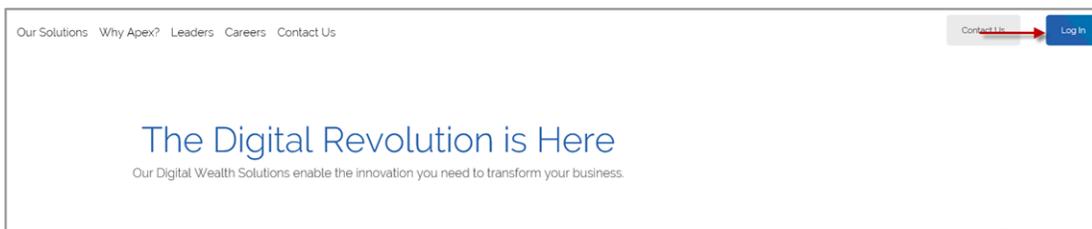
INTRODUCTION

Use the following information to provide access and set up accounts in APEX Online.

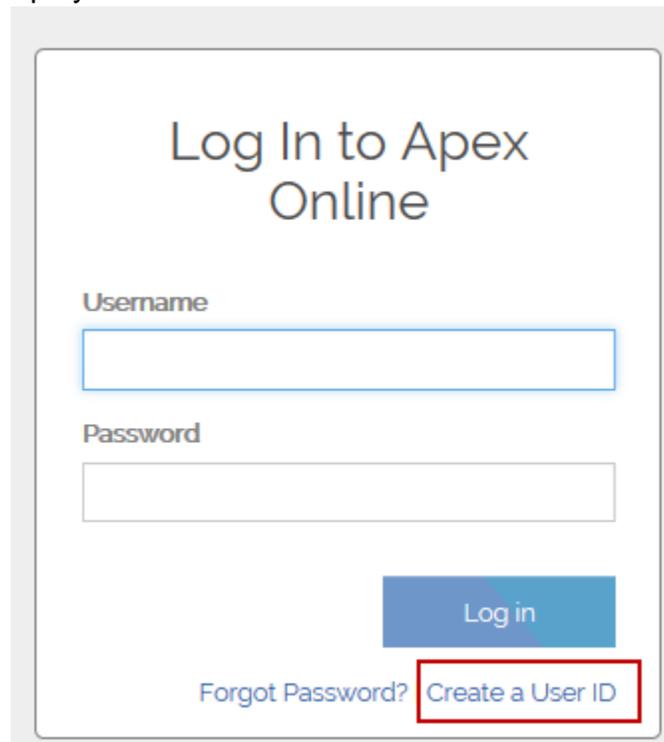
ACCESSING APEX ONLINE

Access APEX Online using the following URL: www.apexclearing.com.

1. Click **Log In** in the top, right corner of the screen.



2. The *Log In* screen displays as shown below.



3. Click **Create a User ID** as indicated above.

- The *New User ID Setup* screen displays as shown below.

- Click **Next** if you are the end client.

NOTE: If you are a broker, send a request email to CS@apexclearing.com to request access. You must be on the contact sheet in order to request access. If you are not on the contact sheet, have someone from the firm on the contact sheet submit the request.

Creating a New User ID

- Change the **Firm** dropdown field to **10-Apex Clearing Corporation**, and enter your account number in the **Account Number** field with no dashes and click **Next** as shown in the following example.

- Type the Social Security Number (SSN) or Tax ID that is associated with the account (with no dashes) in the **Tax ID Number** field as shown in the following example.

3. Enter a valid email address in the **Email Address** field. APEX uses the email address to reset passwords. Click **Enter**. See the example below.

New User ID Setup

Please provide a current E-mail Address.

Account Number: 10-9YY05076

E-mail Address: x *

Please enter a valid e-mail address.

Buttons: Cancel, << Back, Next >>

4. Select and answer the secret question in the **Secret Question** field. The system uses the answer to the secret question for security validation. Click Next. See the example below.

New User ID Setup

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?

Buttons: Cancel, << Back, Next >>

5. Enter the user ID and password in the corresponding fields as shown below. Click **Finish**.

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

New User ID Setup

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:

Buttons: Cancel, << Back, Finish

- The New User ID Setup screen displays with a statement stating, “The User ID has been created successfully!” Click the **Click Here to Start Now!** link. See the following example.

• New User ID Setup •

The User ID has been created successfully!

Account Number 10-9YY05076

User ID FILastname

E-Mail 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!**](#)

- The *Account Summary* screen displays as shown below. Use this screen to view additional details. Click the orange buttons to see more information. View statements, confirms, and tax documents by clicking on the **Documents** tab on the top right of the screen.

APEX CLEARING Accounts
Logout

Account #, Name, or SSN

Enter at least 3 letters, numbers, or spaces.

Process Date

Search

SUMMARY | 9YY05076 (Margin) Test Account

Documents

Account Equity

\$0.00

Amount Available to Withdraw

\$0.00

Buying Power

\$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.