

## Keeping up with Technology

Technology changes so fast. Just when you feel you have it figured out, something new comes along. To help you keep up with the technology we offer at Wagner Planning, we have compiled our favorite tips and hints for our various online resources.

### Netx Investor – Account Statements

Netx Investor is your access to see the most recent information on your investment accounts. You may view your current and past statements, holdings and recent transactions.

There are several ways to access this tool: your desktop computer, tablet or smart phone. No matter how you prefer to view your accounts online, the log-in process is the same. You will enter 4DR in the “Financial Org #” box then your username and password. Don’t forget to click “Remember My Device” to make it easier to log in next time.

If you prefer viewing your account on a desktop, you may visit [Wagner Planning](#) to access your Netx Investor account from our website then click Statements. For the investor on the go, you may view your accounts on your “smart” mobile devices, (such as Android or Apple products), by searching for “Netx Investor” where you download your apps. The mobile and desktop versions use the same log-in credentials and have similar functionalities.

After you log-in you may personalize your experience by clicking the “gear” in the upper right corner. Under the Setting tab you can update your email address, change your password or update your One-Time Passcode delivery method. Your One-Time Passcode Method allows you to unlock your account anytime day or night.

Netx Investor makes tax season easier by allowing you to download your tax forms immediately upon release. Also, if you self-prepare your taxes, Netx Investor is compatible with Turbo Tax or H & R Block. By following Turbo Tax or H & R Block instructions, your tax details can be directly uploaded to their software.

We encourage you to be an active participant in your accounts and want you to have peace of mind in knowing we are watching. Keep in mind, Netx Investor is a daily snapshot of your accounts, and does not show historical performance. Historical Performance reporting is offered by a separate service through Albridge.

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## **Albridge – Performance Reporting**

In addition to Netx Investor, Wagner Planning offers historical consolidated performance reporting through the highly respected reporting service Albridge. While some companies create performance reports inhouse, Wagner Planning has hired an unbiased third-party, Albridge, to report on performance.

Many clients will recognize Albridge from the quarterly emails they receive for reporting on Advisory Accounts, but anyone can access Albridge to see historical information on their investments with Wagner Planning.

For those familiar with Albridge, it has a new look. Upon logging in, you now see an updated dashboard of all your accounts. You can click on data points, like Account Details for a deeper look at your accounts as a whole. The customizable reports you know and love are still available by clicking on the Reports tab at the top.

To access Albridge, visit [Wagner Planning](#) and select Performance Reporting. If you have questions regarding Albridge or want to have access, please contact our office and we will assist you further.

## **ShareFile and Email Security**

In the age of internet, email and paperless documents, security has become increasingly important to our clients. Wagner Planning has partnered with a secure file sharing service called ShareFile to meet your needs. ShareFile allows our office to provide you with a secure method of sending or receiving files without fear. For additional precaution, Wagner Planning downloads and deletes the information contained in ShareFile. This is an invitation service, so if you would like access, please contact our office.

Another tool is secure email. While typically unnoticeable in your email inbox, when we send you emails containing sensitive information, we encrypt the data to protect you.

Wagner Planning takes the security of your information seriously and we appreciate you taking the extra measures by using ShareFile or secure email to keep your data safe.



## Password Keeper

Because we contract with various vendors to add security to your accounts, that means you have several ways to communicate with us and different user names or passwords. While using one or two passwords for all websites is convenient, it is not recommended.

Security experts recommend the use of a password keeper such as NordPass, Enpass or Last Pass to keep organized. A password keeper can help you stay secure while minimalizing pesky “Forgot My Password” resets. Password keepers store individual and unique passwords for all the sites you log into, but you only have to remember one password for your password keeper.

We hope you found this information helpful and informative. Wagner Planning works hard to make your online experience a positive one and to keep up with the available technology.

This article was written by Rebecca Magby, Operations Manager for Wagner Planning and Sandra J. Wagner, CFP®. Rebecca has worked for Sandra J. Wagner, CFP® and Wagner Planning since 2009. Sandra has been helping people with their finances since 2001. She is a CERTIFIED FINANCIAL PLANNER™ professional and owner of Wagner Planning.

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