

On-Demand Presentations

Accessible 24/7, these dynamic audio visual tools make it easy to learn about Pershing's solutions—whenever it's most convenient for you. Click below for specific training or product presentations.

On-Demand Training Presentations

NetExchange Pro

- [Create a Group of Accounts](#)
- [Change Reinvestment Instructions](#)
- [Create a Split Screen View in NetExchange](#)
- [Customize Screen Layouts in NetExchange](#)
- [Enter Cost Basis](#)
- [Retrieve Statements, Confirms and Tax Documents](#)
- [Perform an Account Search](#)
- [View Client Account Orders](#)
- [Enter an Equity Purchase Order](#)
- [Enter an Equity Sell Order](#)
- [Enter a Mutual Fund Purchase Order](#)
- [Enter a Mutual Fund Redemption Order](#)
- [Enter a Mutual Fund Exchange Order](#)

On-Demand Product Presentations

Products and services

- [Corporate Executive Services](#)
- [Donor-Advised Funds](#)
- [ETF Center](#)
- [Health Savings Accounts](#)
- [LoanAdvance](#)
- [Lockwood Investment Strategies](#)
- [Mutual Fund Only IRA](#)
- [Portfolio Evaluation Service \(PES\)](#)
- [ProCash Plus](#)
- [Professional Seminar Program](#)
- [RealAdvance](#)
- [Retirement Planning Solutions](#)
- [Reverse Convertibles](#)
- [Trust Network](#)

On-Demand Practice Management Presentations

- [A Broker-Dealer's Guide to Public Relations](#)
- [The Race for Top Talent](#)
- [Marketing Services](#)
- [Drive Growth Through Strategy, Development, and Implementation](#)
- [TalentConnectSM](#)
- [Client Segmentation and Service Model Strategies](#)
- [Practice Development: Identifying and Developing Your Niche](#)
- [A Broker-Dealer's Guide to Attract Top Talent](#)
- [An Investment Professional's Guide to Public Relations](#)

