

Investor360^o® Client User Guide

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Welcome to Investor360°

Investor360° gives you the power to access your investment information from one convenient location. Some of its many features include:

- A customizable dashboard where you can get a quick summary of account balances, holdings, and activity
- Charts and graphs that allow you to evaluate accounts based on asset class and category
- Intraday account balances and access to real-time quotes
- Integrations with TurboTax, TaxAct, and H&R Block to help with tax filing

Logging in to Investor360°

First-Time User

Before logging in the first time, you will need to obtain either a login ID and “onetime” password from your advisor or accept the advisor’s invitation to join Investor360° and create your own. **Please note:** If you experience difficulties with your account, please contact your advisor for assistance.

Accessing Investor360° Using the Login ID and Password Provided to You

1. Go to investor360.com, enter your login ID and temporary password, and click **Log In**.

INVESTOR360°

Login ID

Password

Contact your financial professional for Login ID.
[Forgot Your Password?](#)

Log In

2. Choose your authentication preference for multifactor authentication (MFA), and then click **Next**.

INVESTOR360°

Add More Security to Your Account

Nothing is more important than ensuring your personal financial information is private, safe, and secure. That's why Investor360° is offering an extra level of security to access your account with a one-time security passcode from PingID.

If you have any questions, please refer to these [FAQs](#) or contact your financial professional.

To verify your identity with a one-time passcode, select your authentication preference.

Text Voice PingID App

Cancel Next

Powered by PingIdentity



- Once set up, enter the code you received to confirm it's you. Click **Next** to continue.

- Add additional devices, if you would like, and when ready select **Submit Registration**.

- Enter the code you received to complete your MFA login process and click **Sign On**.

- Read the Terms and Conditions (you must scroll to the end), check the box, and click **I Accept**.



- Next, click the **Select the Owner of This ID** dropdown menu, which displays a list of users associated with the household as well as “Other,” and provide an email.

Please note: If you are the owner of the account, you should select yourself; “Other” is only for persons not listed as account owners (e.g., POA or attorney).

INVESTOR 360°

Let's get you set up.

PERSONAL INFORMATION

Select the Owner of This ID

EMAIL

Provide an Email That This ID Belongs to*

Confirm Email*

- Enter and confirm your password, following the password requirements listed below.

PASSWORD

Password must have at least:

- 8 characters
- 3 of the following character categories: Uppercase letters, Lowercase letters, Numbers, or Special characters (e.g., @, #, \$)

New password*

Confirm password*

- Select two security questions and enter their answers. These will be used if you forget your password.

SECURITY QUESTIONS

Please select two security questions and enter their corresponding answers. These answers can be used to regain access to your account if you forget your password.

Security Question 1*

Answer 1*

Security Question 2*

Answer 2*



10. Define your paperless preferences by account and document type (you may define them for accounts you are the owner of). If you choose e-delivery, select the account owner who will receive it, add their email, and select **Finish**.

Please note: Enrolling in e-delivery does not email the actual document; rather, it sends a notification informing you the document is available to view.

PAPERLESS PREFERENCES

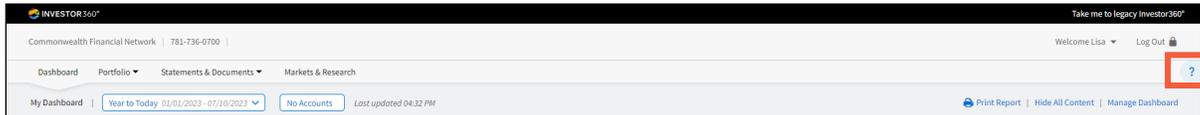
Choose how you would like to receive your statements.

Please note: Choosing E-delivery may not prevent all physical mail because not all client communications are available for paperless delivery.

DOCUMENT TYPE	POSTAL DELIVERY	E-DELIVERY
	Select All	Select All
Confirms	<input type="radio"/>	<input checked="" type="radio"/>
Customer Correspondence	<input type="radio"/>	<input checked="" type="radio"/>
Tax Documents	<input type="radio"/>	<input checked="" type="radio"/>
Statements	<input type="radio"/>	<input checked="" type="radio"/>
Shareholder Reports	<input type="radio"/>	<input checked="" type="radio"/>

Send E-delivery to* Email*

11. Once logged in to the platform, you will be presented with a quick tour and can start using Investor360°. You can access additional help documentation directly from the application by selecting the question mark icon in the top right corner.





Accessing Investor360° Using an Email Invitation

1. Click **Get Started** in the email you received inviting you to join Investor360°.

The screenshot shows an email from Investor360°. The header includes the Investor360° logo and the text "Welcome to Investor360°". The body of the email is addressed to "Dear [Name Redacted]" and states that the recipient has been invited to use Investor360°, a wealth management tool. It lists several benefits: real-time viewing of holdings and account balances, quick access to statements and tax documents, the ability to upload and share documents, and secure online messaging. A note indicates that the invitation expires in 3 days. A blue button labeled "Get Started" is highlighted with a red box. At the bottom, there is a disclaimer: "This is an automated message from Investor360°. Please do not reply to this e-mail." and copyright information for 2024 Commonwealth Financial Network, a member of FINRA/SIPC.

2. If you are an account owner, enter your Date of Birth and the last four digits of your SSN/TIN, and then click **Verify**. **Please note:** If you are not an account owner, you will not see this step.

The screenshot shows the verification step of the Investor360° onboarding process. It features the Investor360° logo and the text "Welcome to Investor360°!". Below this, it instructs the user to verify their personal information to set up their login ID and password, noting that they have 5 attempts. The form includes a "Full Name" field with a placeholder "[Name Redacted]", a "Date of Birth*" field with a calendar icon and a "MM/DD/YYYY" format, and a "Last 4 Digits of SSN/TIN*" field. A blue "Verify" button is highlighted with a red box.

3. Create your Login ID and Password, and then click **Next**. Your Login ID will be validated to ensure uniqueness in the database. If the ID you have chosen is already in use, you will be prompted to create a different one.

The screenshot shows the login ID and password creation screen. It features the Investor360° logo and the text "Welcome, [Name Redacted]!". It prompts the user to create their login ID and password. There is a "Login ID*" field. Below it, the "Password Requirements:" are listed: 8 characters and 3 of the following character categories: Uppercase letters, Lowercase letters, Numbers, or Special characters (e.g., @, #, \$). There are "Password*" and "Confirm Password*" fields. At the bottom, there are "Cancel" and "Next" buttons, with the "Next" button highlighted by a red box.



4. Select two security questions and enter their answers, and then click **Next**. These will be useful if you forget your password.

INVESTOR 360®

Security Questions

Please select two security questions and enter their corresponding answers. These answers can be used to regain access to your account if you forget your password.

Security Question 1*

Answer 1*

Security Question 2*

Answer 2*

5. Click **Continue** to be brought to the Login page.

INVESTOR 360®

Security Questions

Please select two security questions and enter their corresponding answers. These answers can be used to regain access to your account if you forget your password.

Security Question 1*

Answer 1*

Security Question 2*

Answer 2*

Let's log in to Investor360®

Great work! You're ready to log in to Investor360®. Select the Continue button below and then enter your Login ID and Password on the next screen.

6. Enter your Login ID and Password, and then click **Log In**.

INVESTOR 360®

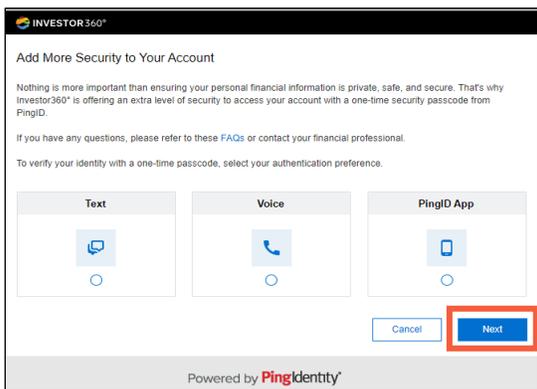
Login ID

Password

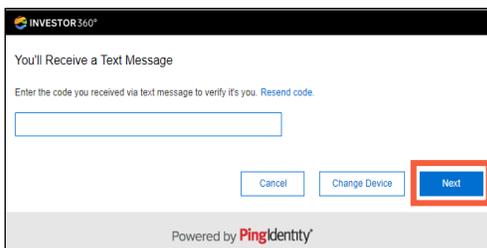
Contact your financial professional for Login ID.
[Forgot Your Password?](#)



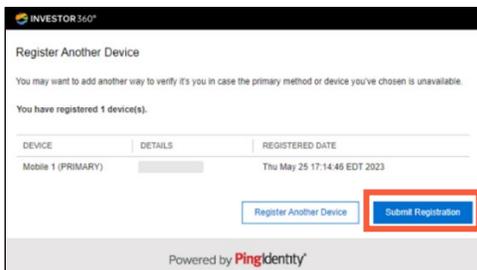
7. After you are prompted to choose your authentication preference for MFA, click **Next**.



8. Once set up, enter the code you received to confirm it's you. Click **Next** to continue.



9. Add additional devices, if you would like, and when ready select **Submit Registration**.



10. Enter the code you received to complete your MFA login process and click **Sign On**.





11. Read the Terms and Conditions (you must scroll to the end), check the box, and click **I Accept**.

INVESTOR 360°

Terms and Conditions

Please Note: You must read the entirety of the Terms and Conditions by scrolling to the bottom of the agreement and selecting the checkbox to accept the terms.

User Agreement

SELECT THE ACCEPT BUTTON ONLY IF YOU HAVE READ AND UNDERSTOOD THIS END-USER AGREEMENT AND AGREED TO BE BOUND BY ALL OF THE TERMS AND CONDITIONS SET FORTH HEREIN. IF THIS AGREEMENT IS NOT ACCEPTABLE TO YOU, SELECT THE DO NOT ACCEPT BUTTON AND DO NOT USE THIS SERVICE.

1. Commonwealth Equity Services, LLC, doing business as Commonwealth Financial Network® ("Company"), hereby grants you a nonexclusive, nontransferable license for the term of this Agreement to access and use the Company's Internet-based service (the "Product"). The Product is available through the World Wide Web protocol of the Internet and allows you to obtain information concerning your accounts with Company, as well as to obtain price quotations and other information (some of which may be provided by third parties). You are not authorized to assign, sublicense, or otherwise convey or transfer your rights under this Agreement to another person or entity.
2. This Product is provided for informational purposes only. The content of the Product, including the terms and conditions herein, are subject to change without notice to you. Unauthorized use of, or entry into, this Product, or the misuse of password or information contained within this Product, is strictly prohibited.
3. You shall be the only authorized user of the Product under this Agreement. Data, information, and services accessible through the Product may be displayed, reformatted, and printed for your personal, noncommercial use only. You agree to keep confidential and not cause or permit such data, information, or services to be published, broadcasted, retransmitted, reproduced, commercially exploited, or otherwise disseminated. You agree not to create any derivative works (including databases) based on the Product or any data, information, or services contained therein.
4. You understand that all the terms and conditions of your Customer Account Agreement with Company and Company's clearing agents, National Financial Services LLC and Pershing LLC ("Licensor"), including margin and

By checking this box, I acknowledge that I have read and agree to the Advisor360 Terms and Conditions and Third-Party Terms.

I Accept

12. Define your paperless preferences by account and document type (you may define them for accounts you are the owner of). If you choose e-delivery, select the account owner who will receive it, add their email, and select **Finish**.

Please note: Enrolling in e-delivery does not email the actual document; rather, it sends a notification informing you the document is available to view.

PAPERLESS PREFERENCES

Choose how you would like to receive your statements.

Please note: Choosing E-delivery may not prevent all physical mail because not all client communications are available for paperless delivery.

DOCUMENT TYPE	POSTAL DELIVERY	E-DELIVERY
	Select All	Select All
Confirms	<input type="radio"/>	<input checked="" type="radio"/>
Customer Correspondence	<input type="radio"/>	<input checked="" type="radio"/>
Tax Documents	<input type="radio"/>	<input checked="" type="radio"/>
Statements	<input type="radio"/>	<input checked="" type="radio"/>
Shareholder Reports	<input type="radio"/>	<input checked="" type="radio"/>

Send E-delivery to*

Email*

13. Once logged in to the platform, you will be presented with a quick tour and can start using Investor360°. You can access additional help documentation directly from the application by selecting the question mark icon in the top right corner.

INVESTOR 360° Take me to legacy Investor360°

Commonwealth Financial Network | 781-736-0700 | Welcome Lisa | Log Out

Dashboard | Portfolio | Statements & Documents | Markets & Research

My Dashboard | Year to Today 01/01/2023 - 07/10/2023 | No Accounts | Last updated 04:32 PM

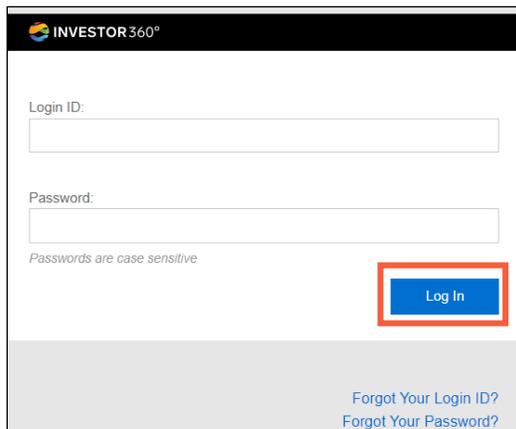
Print Report | Hide All Content | Manage Dashboard

?



Existing User

1. Go to investor360.com, enter your login ID and password, and click **Log In**.



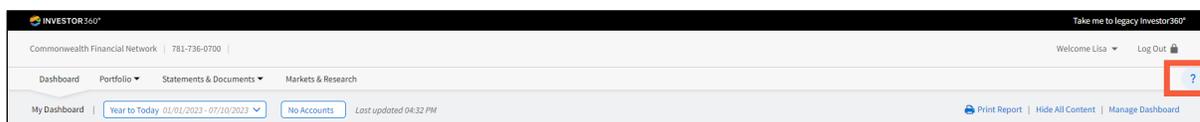
The image shows the Investor360 login page. At the top left is the Investor360 logo. Below it are two input fields: "Login ID:" and "Password:". Below the password field is the text "Passwords are case sensitive". A blue "Log In" button is highlighted with a red box. At the bottom right, there are two links: "Forgot Your Login ID?" and "Forgot Your Password?".

2. Enter the code you received to complete your MFA login process and click **Sign On**.



The image shows the Investor360 MFA screen. At the top left is the Investor360 logo. Below it is the text "SMS sent to Mobile 1 (*****10) Enter the passcode you received." Below this is a large input field for the passcode. Below the input field is a "Resend Passcode" button. At the bottom, a "Sign On" button is highlighted with a red box.

3. Once authenticated, the Investor360° dashboard appears. Access additional help documentation directly from the application by selecting the question mark icon in the top right corner.



The image shows the Investor360 dashboard. At the top left is the Investor360 logo. Below it is the text "Commonwealth Financial Network | 781-736-0700". At the top right is the text "Take me to legacy Investor360°". Below this is the text "Welcome Lisa" and "Log Out". Below this is a navigation bar with "Dashboard", "Portfolio", "Statements & Documents", and "Markets & Research". Below the navigation bar is the text "My Dashboard | Year to Today 01/01/2023 - 07/31/2023 | No Accounts | Last updated 04:32 PM". At the bottom right, there are three links: "Print Report", "Hide All Content", and "Manage Dashboard". A question mark icon in the top right corner is highlighted with a red box.



Resetting Your Password

If you forget your password, you can easily reset it.

1. Go to investor360.com and click **Forgot Your Password?**

2. Enter your Login ID and click **Next**.
3. Answer your two security questions and click **Next**. Remember that answers are not case sensitive. **Please note:** If you can't remember the answers to your security questions, contact your advisor for help.
4. Create a new password, confirm your new password, and click **Next**. Passwords must have at least eight characters and include three of the following character categories: uppercase letters, lowercase letters, numbers, and special characters (e.g., @, #, and \$).
5. Select the method of MFA.
6. Your password is now reset. Click **OK** to log in using your new password.
7. Enter your Login ID and the new password on the login page.
8. You'll be prompted to input the passcode for MFA. Click **Sign On** after you enter it.

9. Once the passcode is authenticated, your password is now reset and your Investor360° dashboard appears.



Getting Started with Investor360°

Resources are available to learn more about the platform's features.

Videos series: The [videos](#) cover the following topics:

- Customizing the Dashboard
- Customizing Holdings View
- Exporting Account Activity
- Uploading Documents
- Markets and Research

In-app help: Simply click the question mark icon in the top right corner to launch the help feature.



Dashboard

The dashboard, which gives you a snapshot of the entire Investor360° platform consolidated on a single screen, is made up of widgets that contain different data about your portfolio. You can manage your dashboard by selecting which widgets are visible as well as where they appear on the screen.

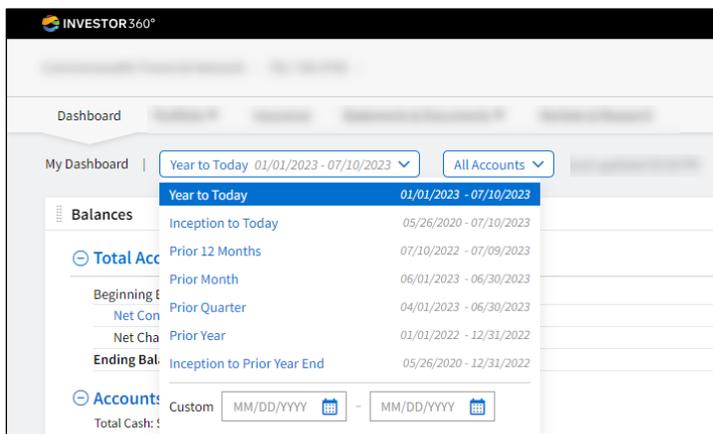
Using the Date Dropdown Menu

Use the Date dropdown menu at the top of the screen to choose the date range for the data displayed on the screen.

Reference the Last Updated time at the top of the page when looking at “Year to Today” or “Inception to Today” to ensure that you are looking at the most recent data.

When you select anything other than “Year to Today,” we highlight the dropdown menu to remind you that you have filtered the data.

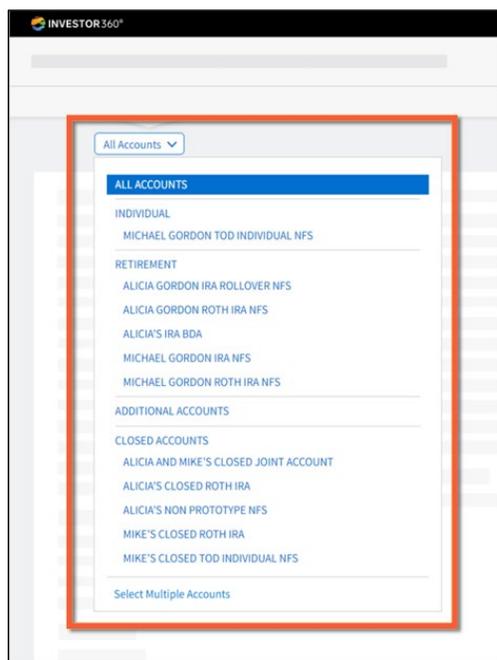
Please note: Your date selection will carry over from session to session until you change it.





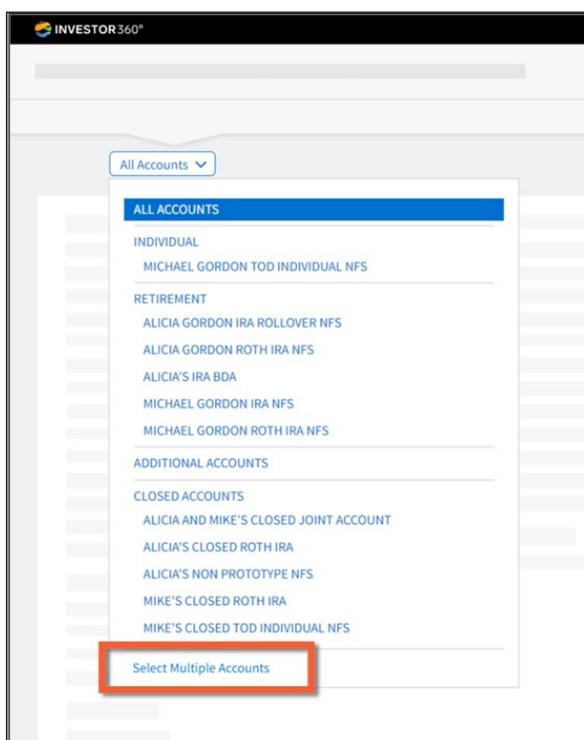
Using the Account Dropdown Menu

Use the Account dropdown menu to select the account data you want to view. You can select all accounts, a specific group of accounts (e.g., retirement), or a single account.



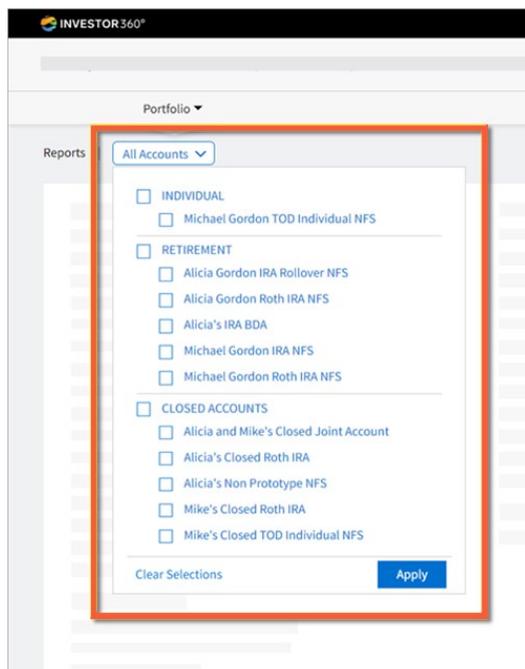
When you select anything other than “All Accounts,” we highlight the dropdown menu to remind you that you are looking at a subset of accounts. You can also use the **Select Multiple Accounts** link to create a temporary group of accounts to view.

1. From the Accounts dropdown menu, click **Select Multiple Accounts**.





2. Check the boxes for the accounts you want included. Select the category checkbox to include all accounts in that category.

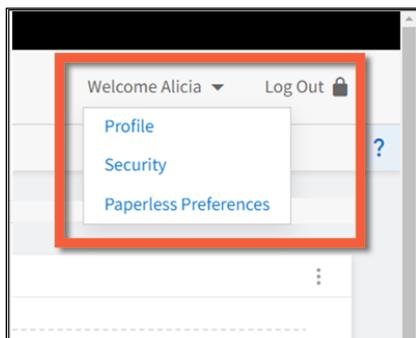


3. Select **Apply**.
4. Select the dropdown menu again to make a different selection or click **Back to All Accounts**.

Please note: Unlike the Date dropdown menu, your selection in the Account dropdown menu will not carry over from session to session; instead, it will revert to All Accounts selected.

Settings

You will see your name as a dropdown menu in the top right corner across the entire Investor360° platform. You can select it to access the following pages:



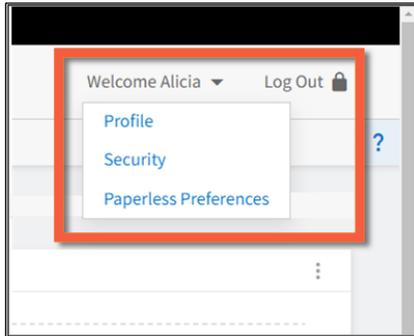
- **Profile:** The profile includes the name and email associated with the Investor360° ID. This email is used for notifications (except Paperless Preferences). **Please note:** Editing your email here does not update the address on file with your advisor's office or paperless preferences.
- **Security:** Change password, update security questions, and manage your MFA settings.
- **Paperless Preferences:** Opt in or out of paperless delivery of important documents and update email addresses associated with paperless preferences.



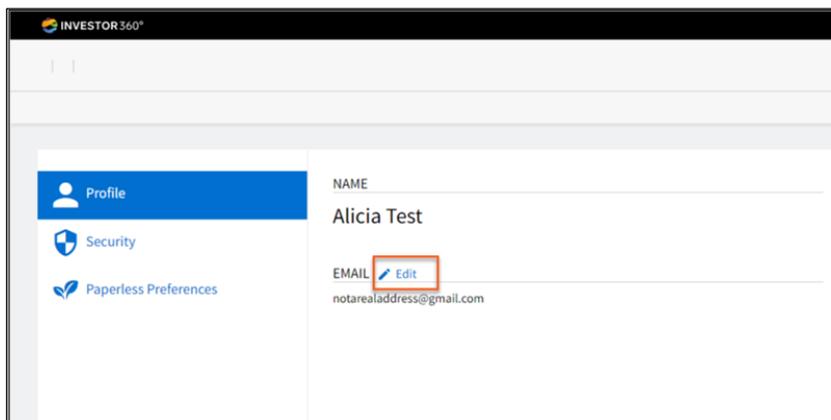
Profile

You can change which email address is associated with your Investor360° account from the Profile page. Remember, editing your email here does not update the address on file with your advisor's office or paperless preferences.

1. Select the **Welcome** dropdown menu with your name in the top right corner of any page in Investor360°.



2. Select **Profile**.
3. Select **Edit** next to the Email field.



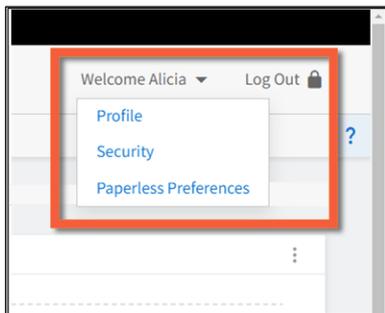
4. Enter the desired email address in both fields and select **Save**.



Security

You can change your password, update your security questions, and manage your MFA from the Security page.

1. Select the **Welcome dropdown menu** with your name in the top right corner of any page in Investor360°.



2. Click **Security**.

3. There are three actions you can take on the Security page:

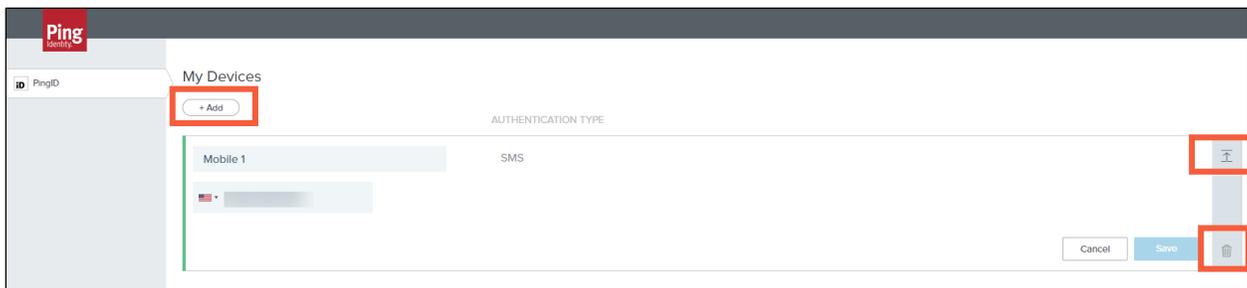
- Select **Change password**. Enter your current password and new password (following the password requirements listed at the top of the window) in the Edit Password window and select **Save**.

- Select **Change security questions**. Enter your two new security questions and answers in the Edit Security Questions window and select **Save**.

- Select **Manage your MFA settings in PingID**. You'll go to a PingID page that lists all of your registered devices. You can add, edit, delete, and set a primary device from this page.



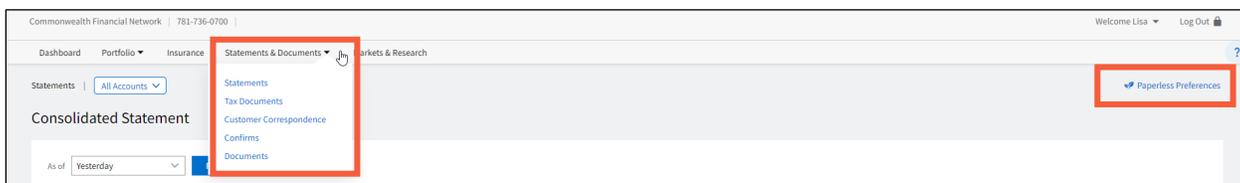
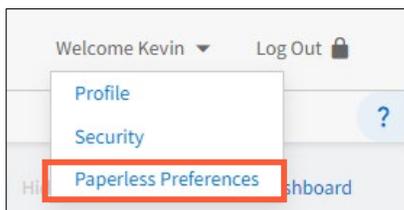
- To add a new device, select the **+ Add** button and enter the information.
- To edit an existing device, select the **expand** icon to the right of the device's row, make your edits, and select **Save**.
- To delete an existing device, select the **expand** icon to the right of the device's row and select the **trash can** in the bottom right corner of the expanded row.



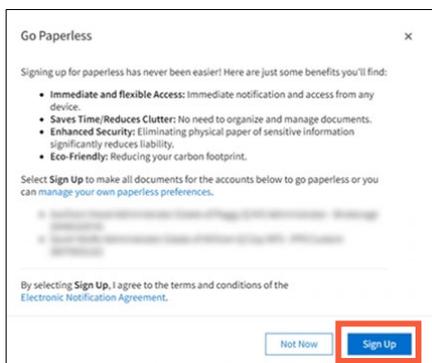
Paperless Preferences

From the Paperless Preferences page, you can go paperless and receive email notifications of brokerage statements, confirmations, tax documents, correspondence, and shareholder reports for any open NFS accounts.

1. Select the Welcome dropdown menu with your name in the top right corner of any page in Investor360° and select **Paperless Preferences** or select the **Paperless Preferences** link at the top right of the Statements, Tax Documents, Customer Correspondence, and Confirm pages.

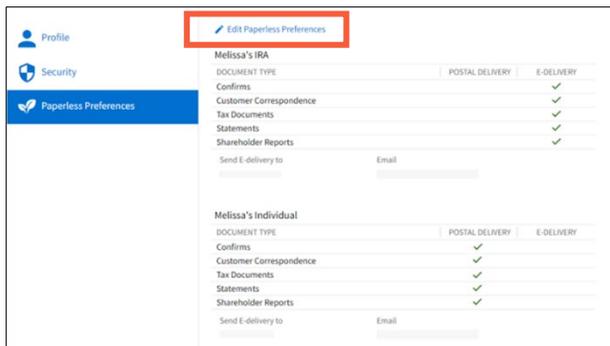


Please note: If you have accounts that aren't signed up for paperless delivery, you'll receive the following pop-up message that allows you to easily click **Sign Up**, which elects paperless delivery for the accounts referenced.

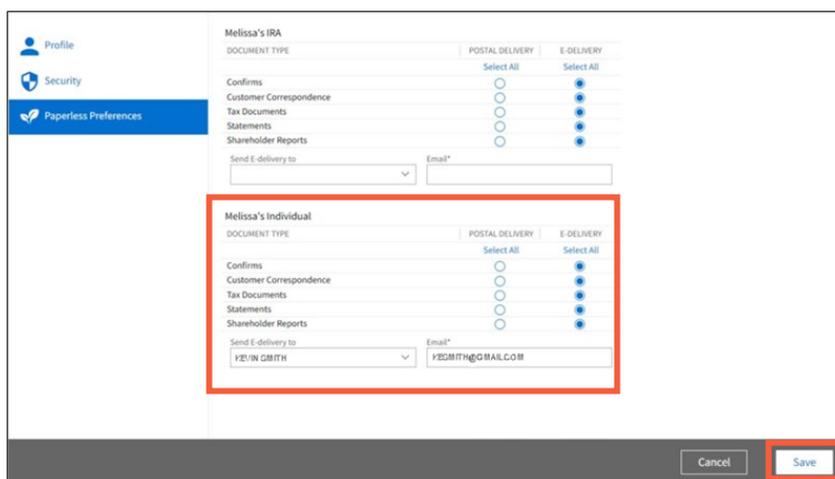




- The accounts available for paperless and your current selections for each document type—postal delivery or e-delivery—will be displayed. Select **Edit Paperless Preferences** to make changes.

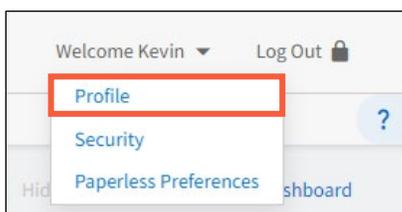


- Review/edit the preferences by account and document type. If you choose e-delivery, you must also select the recipient and enter the account owner's email address. Now select **Save**.



Please note: The email entered here is for e-delivery of the specified document types only. If you change your email address under Profile, it doesn't automatically change the email address used for e-delivery.

You'll need to manually change the email address under Paperless Preferences, as shown in Step 3 above, to have documents sent to the new email address.





4. After enrollment in e-delivery, you'll begin receiving notifications via email when documents are generated and available online. Below is an example of a notification for your reference.

Please note: The email for confirmations, customer correspondence, tax documents, and statements will prompt you to sign in to Investor360° to view them, whereas shareholder reports will link to the sponsor website.

See your statement online now. [View in your browser](#)

 **Commonwealth**

See your statement online now

For investment accounts: XXXXX0001,XXXXX0002,XXXXX0003
Dear Investor(s),

To view your statement and supplemental notices (if applicable), please:

1. Click [here](#) to sign in to your investment account
2. Enter your ID and password
3. Navigate to the online documents section of your account

You are receiving this email because you have enrolled in eDelivery. If you wish to update your delivery preferences, please log in to your account.

Sincerely,
COMMONWEALTH FINANCIAL NETWORK

Having an issue logging in with a Safari browser? Click [here](#).

Help:

Questions? Please contact your representative.
(Note: Do not reply to this email. Any email received will not be reviewed or monitored)

This communication is a transactional/relationship message from National Financial Services LLC. Do not reply to this email message as it was automatically generated.

Account carried with National Financial Services LLC, Member NYSE [SIPC](#).
492637.19.0 CV4

EMAIL REF# 12345678901.2345678

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