

# Investor360° Setup

## Reference Guide

Investor360° is a simple and convenient way for clients to view the information you value most. Use this guide to set up Investor360° on your computer and mobile device.

### How to set up?

1. From a **desktop/laptop computer**, go to [www.investor360.com](http://www.investor360.com).
2. Enter your **Login ID** and the **temporary password** you received from your financial professional. Note: You should have received two emails: one email with your Client Login ID and one email with your temporary password.
3. Select **Log In** and enter your **Login ID and temporary password**.

### Multi-Factor Authentication

Multi-factor authentication (MFA) uses more than one kind of verification to ensure that the person logging in is who they say they are. MFA ensures a secure, verified connection every time you log in to Investor360.com. Each time you sign in to Investor360° you will be sent a one-time passcode to verify it is you.

Examples of authentication factors:

- Password plus a text message to a registered device
- Password plus a phone call to a registered device
- Password plus authentication on a registered device

### How it Works - Select a Multifactor Authentication Method

1. If you have not configured MFA, choose a method to receive a passcode.
  - Select either **Texting, Voice (Phone Call)** or **PingID App**
2. If you have configured MFA, the device you selected will receive a message containing a passcode.
  - *If using PingID, you need to open the app on your smartphone to authenticate. See Using PingID Method below for more info.*

### Using PingID App Authentication Method

1. If you do not have the PingID app, you will be asked to set it up on your mobile device. Download the app and ensure you allow push notifications and access to your location and camera. If you already have PingID installed, proceed to step 2.
2. Scan the QR code using your mobile camera in order to register your mobile device. This will bring you a registration screen confirming the device you added. You may either register another device or click on Submit Registration.
3. Approve the authentication request in PingID using your mobile device. The Investor360° login completes automatically.

### Using Texting or Voice (Phone Call) Method

1. Enter the mobile number you want associated with your profile. You will receive a text or phone call with a one-time passcode.
2. Enter this passcode and click Next.

### Setting up Your Profile

1. Accept the **Terms and Conditions** of the Investor360° User Agreement.
2. Enter the requested profile information in the **Settings** screen.
3. Enter your email address.

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3. Your registered device will appear on the screen and you will be asked if you want to add another device. When ready, select **Submit Registration**.
4. You will then receive a second passcode on your mobile device. Enter the passcode and select **Sign On**.
4. Update your password by entering the temporary password and then create a new password (must be a least 8 characters)
5. Select and answer the two **Secret Questions**.
6. Select **Save**.

### Setting up Access to Your Financial Documents (for e.g., Statements, Financial Planning Documents etc.)

You can access your financial documents easily and securely through the Statements & Documents tab.

1. Click on the **Statements & Documents** tab.
2. Select the **Documents** subtab to the right of the Statements & Confirms subtab,
3. Click on **I Accept** to view documents within Investor360°.

### Recovering Your Login ID

If you forgot your Login ID, call your financial professional.

### Secure Messaging

Investor360° includes a permission-based secure messaging platform that makes it easy to send and receive secure messages with your advisor. You can use the app on your mobile phone to view your account and send secure messages to your advisor.

#### How to send a secure message

1. From **Investor360°**, click on the **Messages Tab**.
2. Select **Compose** to start a new message.
3. Type or paste in a message.
  - a. Attach a file to the message by clicking on the paperclip
4. Select **Send** when finished.

### Resetting Your Password

1. Go to [www.investor360.com](http://www.investor360.com).
2. Select **Forgot Your Password?**
3. Enter your Login ID and select **Next**.
4. Follow the on-screen instructions to create a new password.

### Editing Account Settings

Use the **Settings** screen to update your account profile, including email address, password, security questions, and paperless preferences.

1. From within Investor360°, select **Settings**.
2. Make your changes and select **Save**.

### To read and reply to messages

1. To read a message select one of the messages.
2. To respond to a message, select one of the messages.
3. Select **Reply All** to respond.

Note: Secure messaging is an optional feature. If you want to exchange messages with your advisor, you need to request access through your advisor to get secure messaging enabled.

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### How to download the Investor360° Mobile app?

To successfully log into the mobile Investor360° application, you first need to log into the browser-based version of Investor360°. See steps above to do this. To download the Investor360° app, navigate to the application store on your mobile device or simply use your phone's camera to scan the applicable QR code below:

#### Apple/iOS Devices – App store



#### Android Devices – Google Play store



1. Select **Get/Install**.
2. Select **Open** to launch Investor360°.
3. Enter your Login ID and password.
4. Select **Login** to access your account.
5. You will need to either use the one-time passcode texted to you, or the PingID app, to complete your login.