Welcome to Investor360°!

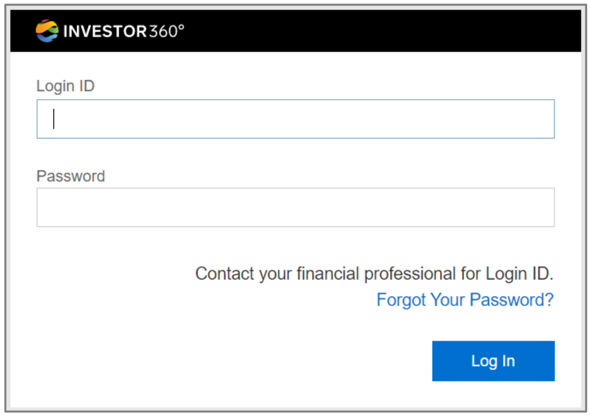
Investor360° is a secure platform that lets you view your accounts, access statements, send and receive secure documents, and more.

Have questions? Check out Investor360° In-App Help . You can find detailed instructions for these topics and more:

- View statements
- Upload documents securely
- Add external accounts
- Download the Investor360° app

Accessing Investor360° for the First Time

You should have received an email from your financial professional with a unique Login ID and temporary password.



1. Go to Investor360.com and enter the login ID and password you were given.
2. You'll prompted to set up **multi-factor authentication** (MFA). (See the blue sidebar to learn more about how this works in Investor360°.) You'll be asked to verify your MFA by text, phone call, or PingID notification, depending on the option you used.
3. Read the Terms and Conditions **(be sure to scroll to the end)**, then select **I accept**.
4. Next, you'll be asked to confirm some personal information. Select the name of the person in your household who should own this Investor360° login, then add your email.
5. For your security, create a new password. (We recommend **not** using a password you use anywhere else online.) You'll also be asked to set up two security questions and answers. These will help you access your account if you forget your password.
6. You're almost done. Define your paperless preferences, by account and document type. If you choose e-delivery, confirm who will receive it and their email.

That's it! You're officially set up in Investor360°.

What is multi-factor authentication?

Multi-factor authentication (MFA) keeps your account safe by requiring you to verify your identity with two methods: your password **and** a text, call, or notification to your phone.

Investor360° gives you three choices for MFA. When you log in, you can receive:

- A text,
- A phone call, **OR**
- A notification on the PingID app

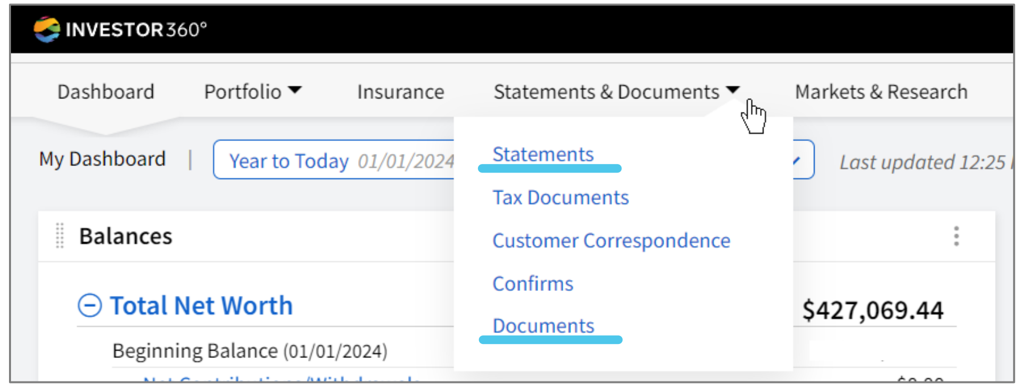
For most people, verifying with a text or phone call to the phone number on file is simplest. If you're having trouble getting a text or call, the PingID app allows you to verify from your device. If you select **PingID**, you'll get a link to download the app.

Learn more about how Investor360° keeps your information secure.

There's so much to do in Investor360°. Once you've set up your account, you can:

View Your Statements

With Investor360°, you no longer have to request statements from your financial professional. Find statements for your investments on the **Statements & Documents** tab.



Upload Documents Securely

You can also use the Statements and Documents tab to send important documents to your financial professional. Documents are sent securely, so you can be confident that your personal information stays safe. Visit in-app help to learn how to upload documents.

Add Your Accounts from Other Institutions

You can link accounts from other institutions to Investor360°, giving you a fuller picture of your finances. Once the accounts are linked to Investor360°, you can view your account balances on the **Portfolio** tab, as well as include the external accounts in certain reports, including:

- Portfolio Summary
- Financial Summary
- Consolidated Statement
- Net Worth Statement

To add external accounts, go to the **Portfolio** tab. Select **Holdings**, then scroll down to the **Additional Accounts** section. Click **+ Add Account**, and Investor360° will walk you through the process step-by-step. (Need more help? In-app help has instructions on adding external accounts.)

Tips for Adding External Accounts

- It's best to set up aggregation after hours, when there is less traffic on both Advisor360° and external institutions' sites. For example, we've found that clients are more likely to have success connecting Fidelity and Vanguard accounts in the evening.
- If you have trouble finding your financial institution, verify that you're searching with the correct URL.
- Be prepared for multi-factor authentication requests from your other institutions. Keep phone nearby to answer login prompts.
- Not all financial institutions support account aggregation, especially smaller ones. Contact your institution for support.

Still having trouble adding an account? You can also add accounts manually, though they will not be updated in real time.

Download the Investor360° Mobile App

You can view your account balances, holdings, account activity, and more on the Investor360° mobile app for iOS and Android. The app offers all the features of the desktop experience, optimized for your phone. **Scan the QR code to get started.**

Still have questions or want to learn more? Access in-app help from any page in Investor360°.