



Welcome to Investor 360®! The advanced client website illustrates account information, such as account balances, positions, and activity, as well as provides secure access to documents and statements, whenever you want it — 24 hours a day, 7 days a week, 365 days a year.

We have created an Investor 360® User Guide to help you with your new account tool. If at any time you need help, reach out to our office for further assistance. [URL: www.investor360.com](http://www.investor360.com)

## FIRST LOGIN:

- 1 Log into the account using your chosen Login ID and the temporary password provided by our office. **First login must be done in an Internet browser.**

1 INVESTOR 360°

Login ID

Password

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

Log In

2 INVESTOR 360°

Let's get you set up.

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\*

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\*

Cancel Finish

- 2 Once you have signed in for the first time the next screen will allow you to choose your password and security questions for your account.

Remember passwords must have at least:

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

When you have completed the prompts you can click **Finish** to continue on to your profile.

## FORGOTTEN PASSWORD?:

- 1 Click on *Forgot Your Password?* to get started.

1 INVESTOR 360°

Login ID

Password

Contact your financial professional for Login ID.

[Forgot Your Password?](#)

Log In

## 2 Reset Your Password

Enter your Login ID then select **Next**.

Login ID\*

Cancel

Next

- 2 Enter your Login ID in the space provided. Click **Next** to continue.

If you do not know your Login ID, call our office and we can assist you.

- 3 Answer your security questions to continue to your account. Click **Next** to continue.

If you do not know the answers to your security questions, call our office and we can assist you.

3 INVESTOR 360°

Reset Your Password

Answer the security questions below then select **Next**.

Security Question 1\*: Father's middle name?

Security Question 2\*: Maternal grandmother's first name?

Cancel Next

### Reset Your Password

Enter a new password and click **Next**.

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 New Password\*

Cancel

Next

4 Once you have answered your security questions you will be able to reset your password.

Remember passwords must have at least:

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

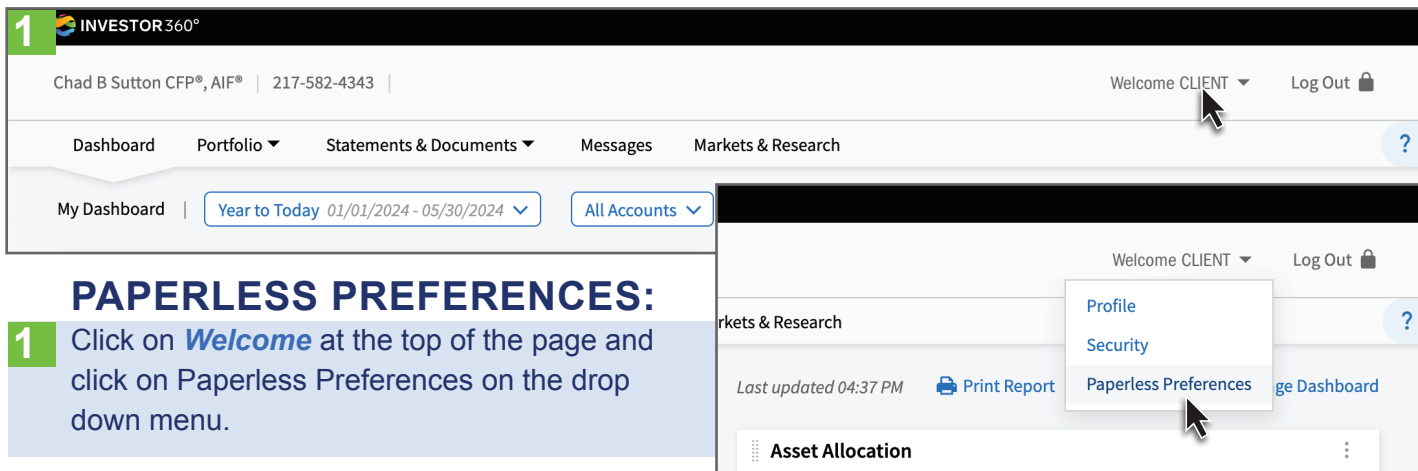
When you have completed the prompts you can click **Next** to continue.

### You've Reset Your Password

You can now log in using your new password.

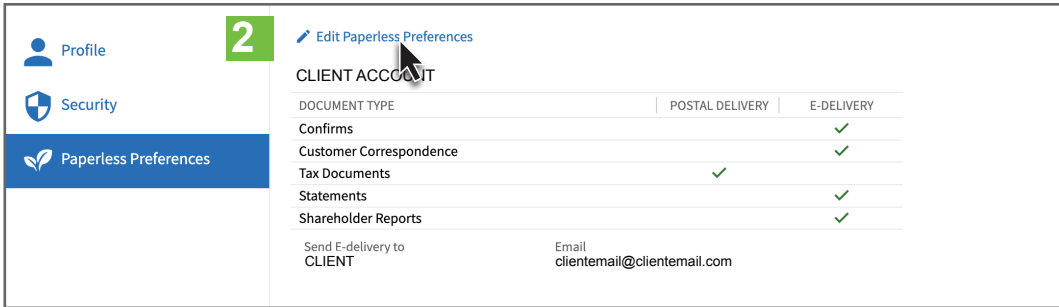
OK

You have successfully reset your password.  
Click **OK** to continue to the Login screen.

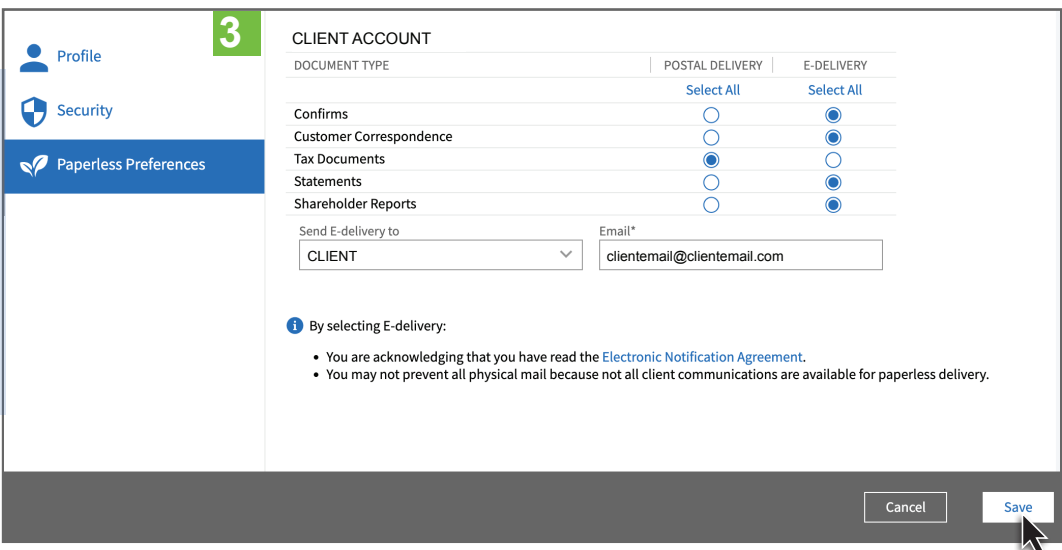


**1 PAPERLESS PREFERENCES:**  
 1 Click on *Welcome* at the top of the page and click on Paperless Preferences on the drop down menu.

**2** Click *Edit Paperless Preferences* to administer changes.



**3** Select which method of delivery you prefer. Our office recommends receiving Tax Documents via Postal Delivery. Click *Save* to continue.



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