

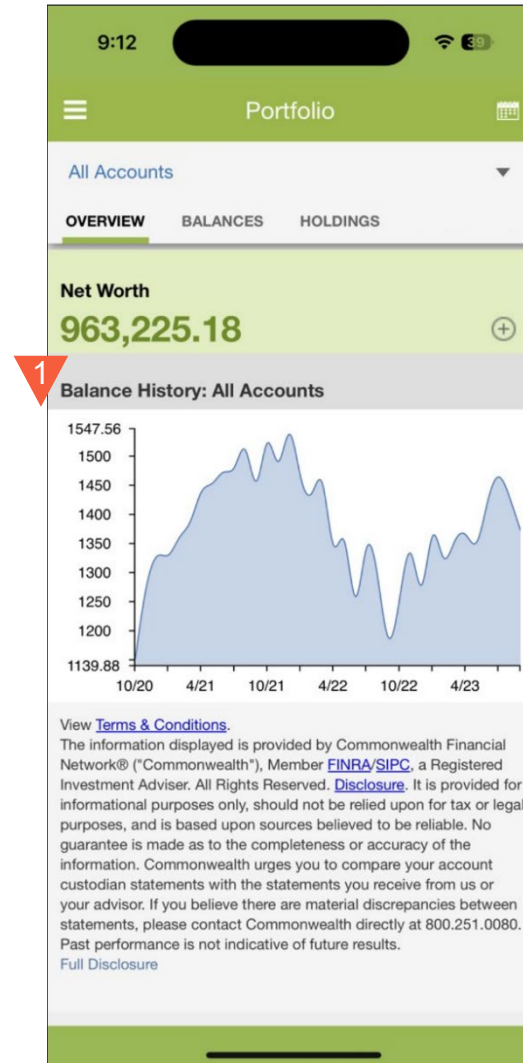
Investor360° Mobile Enhancements

This resource highlights the enhancements in the redesigned Investor360° mobile app.

Overview Landing Page

- 1 **Balance History chart** is now located on the Summary page of the new application.
- 2 The information in the **Balances** tab of the old application is now located on the home Overview page. You may now quickly view your current balance.

Original



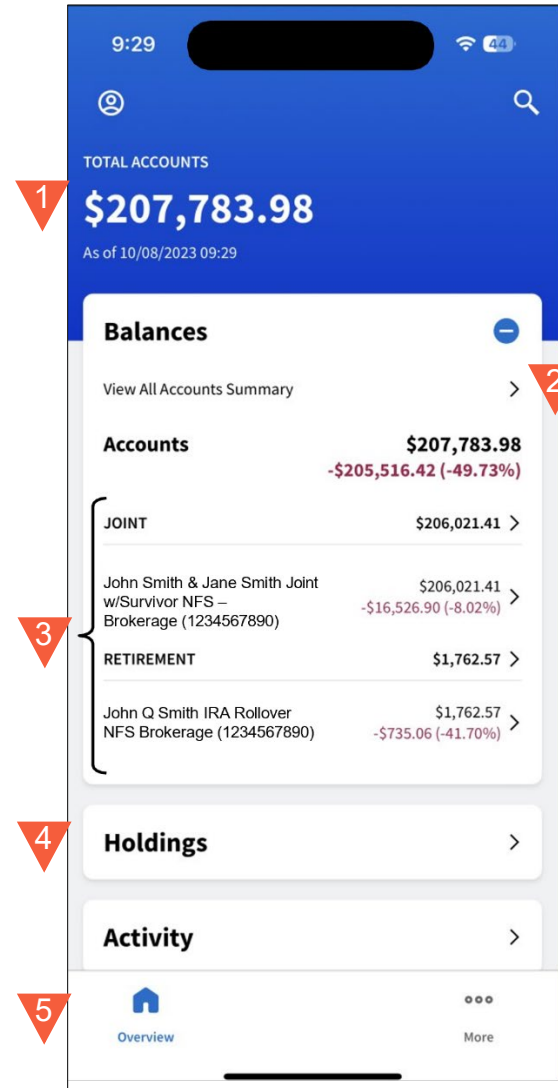
Balances	Total
John Q Smith Individual NFS – Selective Passive Primary Equity (1234567890)	
Cash:	1,365.18
TOTAL	14.32
Additional Assets	961,860.00
⊙ Advisor Manually Entered Account	
Assets	1,561,860.00
Investment Accounts	
Nora American Funds 529 529	60.00
Real Estate/Property	
Beach House	500,000.00
Primary Home	1,000,000.00
Insurance	
J. Quinton Smith Northwestern Life - Universal Life	26,800.00
John Q Smith NYL - Whole Life	35,000.00

Overview Landing Page

The Overview page has been redesigned to give a more modern look and feel.

- 1 You can quickly see a current snapshot of your **Total Accounts** and a breakdown of all the accounts in your portfolio.
- 2 Tappable elements are depicted by “>” which allow you to view more specifics about all your accounts, a group of accounts (i.e., Joint), or an individual account. When you tap into an account or group of accounts, you will be brought to the Summary tab of the account or account group selected.
- 3 If your advisor has manually added Additional Accounts in your portfolio they will be displayed on this page as well.
- 4 Scrolling below the Balances will give you clickable tiles to quickly jump to your Holdings and Activity information.
- 5 A bottom navigation bar has been added to allow you to jump quickly back to this Overview page from any point in the application.

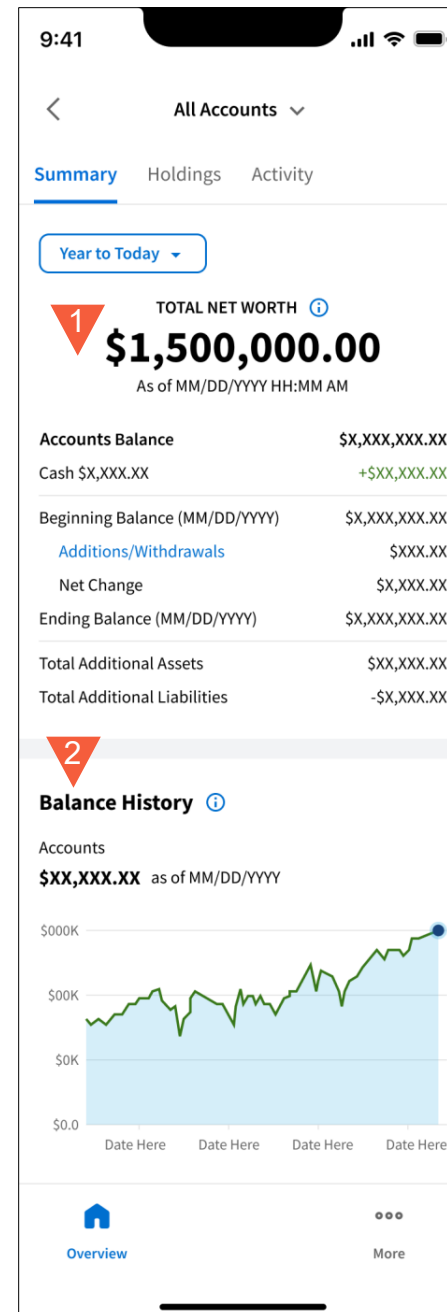
Redesigned



Balance Summary/History

1 The **Total Net Worth** will display only if you have Additional Accounts that have been manually added by your advisor.

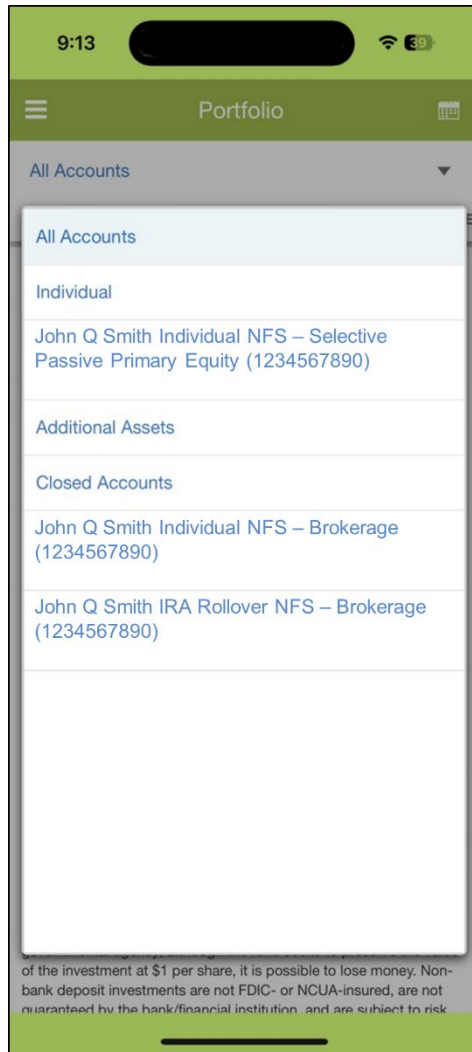
2 The **Summary/Balance History** information for the account balances has moved from the Overview page in the old app, to its own page in the new app. The data display has been modernized to improve the experience.



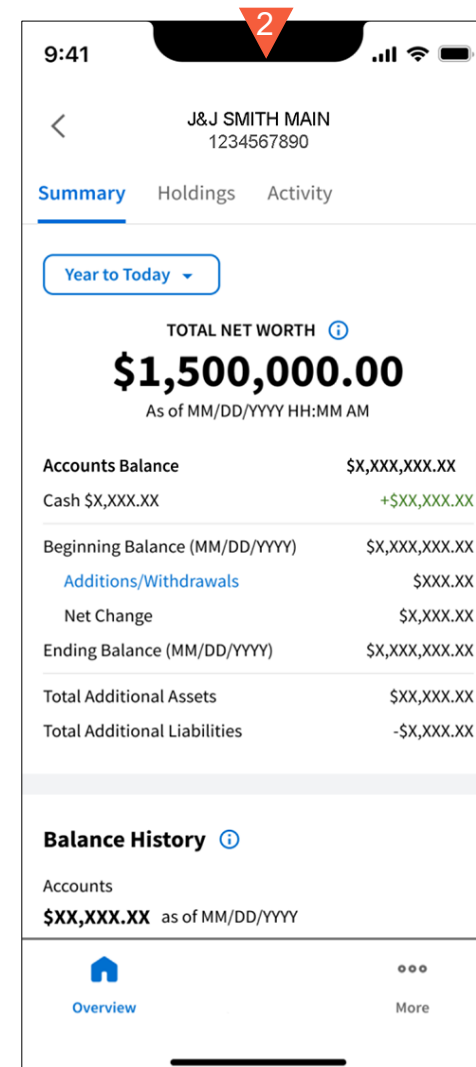
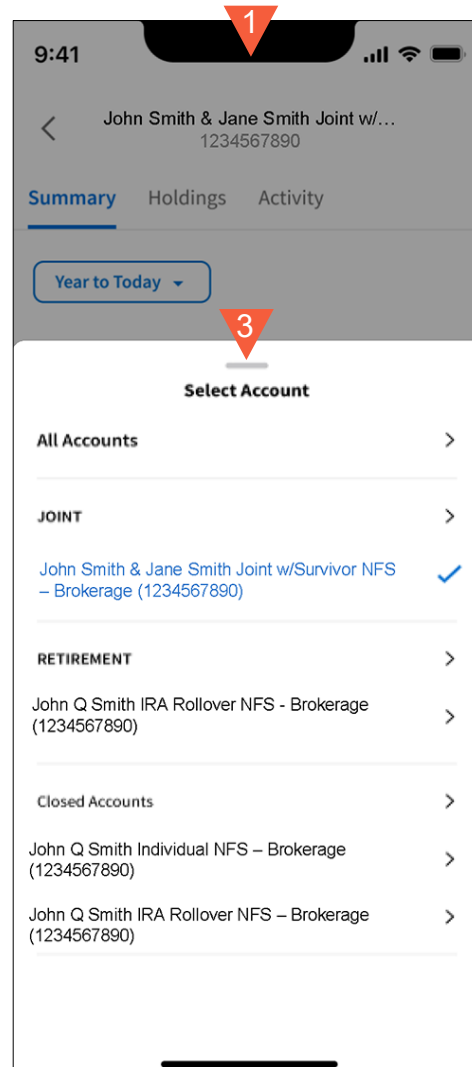
Account Picker

- 1 The **Account Picker** has been moved up into the header of the Summary, Holdings, and Activity pages of the redesigned Investor360°.
- 2 With the redesign, the **Account Number** will always display in the header below the account name.
- 3 When you tap the **Account** in the header, it will open a menu with all your managed accounts listed. You have the option to select All Accounts, an Account Group, or an Individual Account.


Original



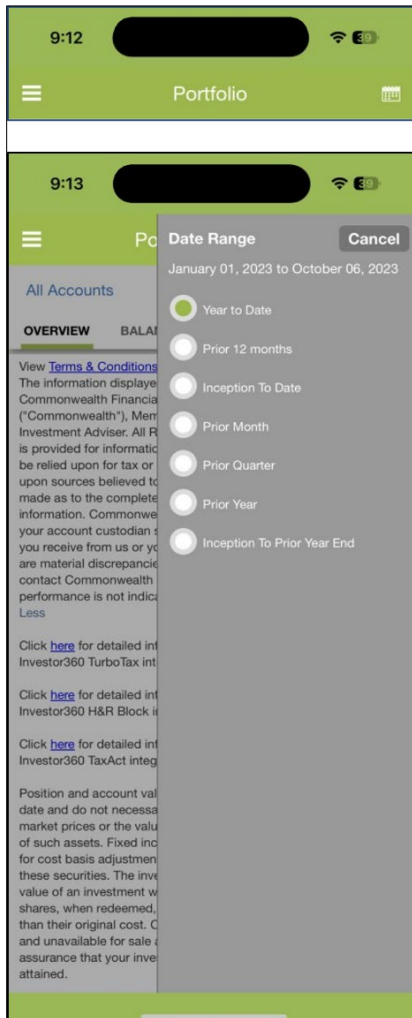
Redesigned



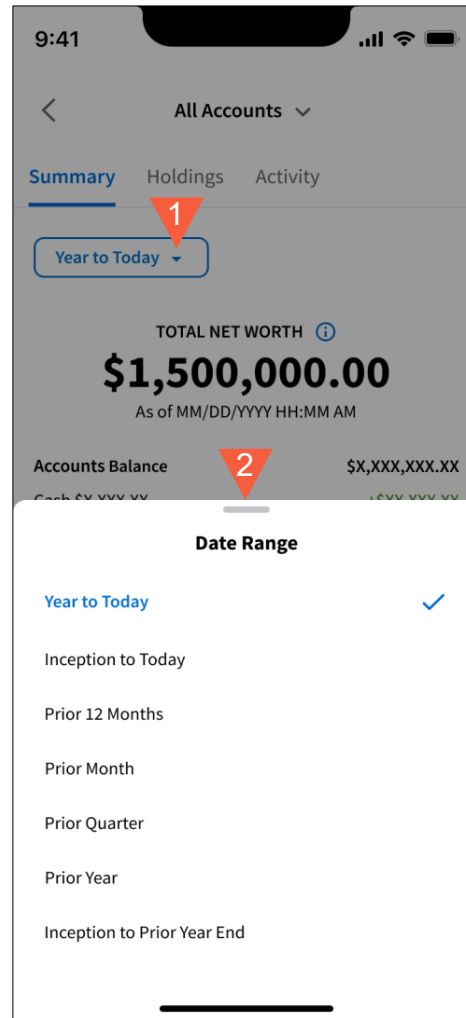
Balance Summary/History Date Range Selector

- 1 The **Date Range Selector** access has changed from being a calendar icon  on the original app header to a link on the redesigned app Summary page.
- 2 The Date Range Selector redesign now includes a modernized page bottom menu functionality.

Original



Redesigned



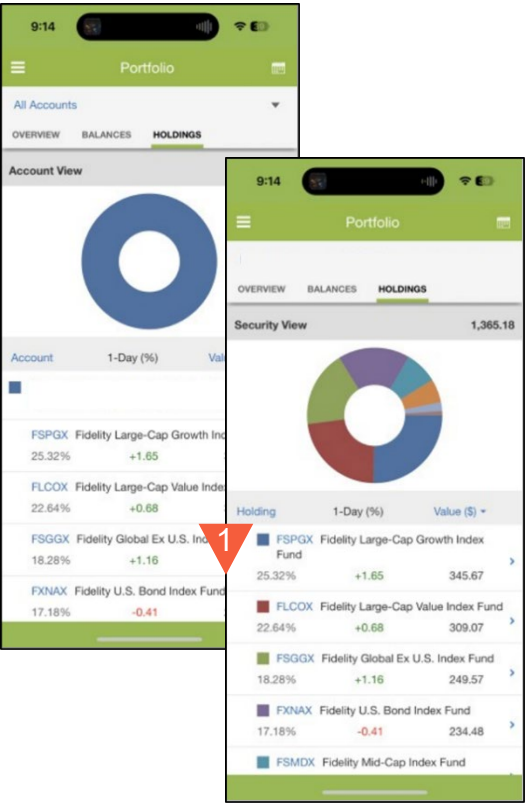
Holdings

1 The Donut Charts from the Holdings page were removed.

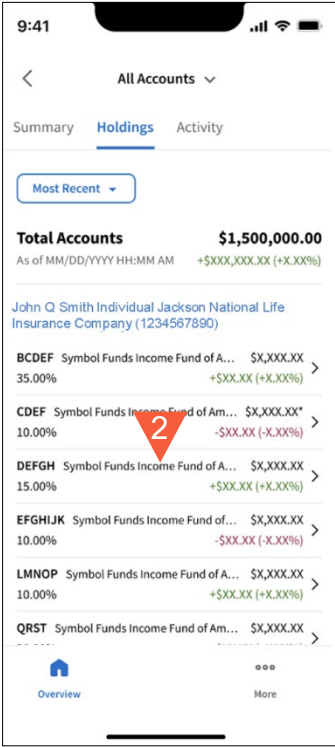
List View

- 2 • A list view of the accounts and the securities with key data points around value, percentage of account, and change information.
- Each security is tappable to open a detailed card with more information about the holding.

Original



Redesigned (List View)



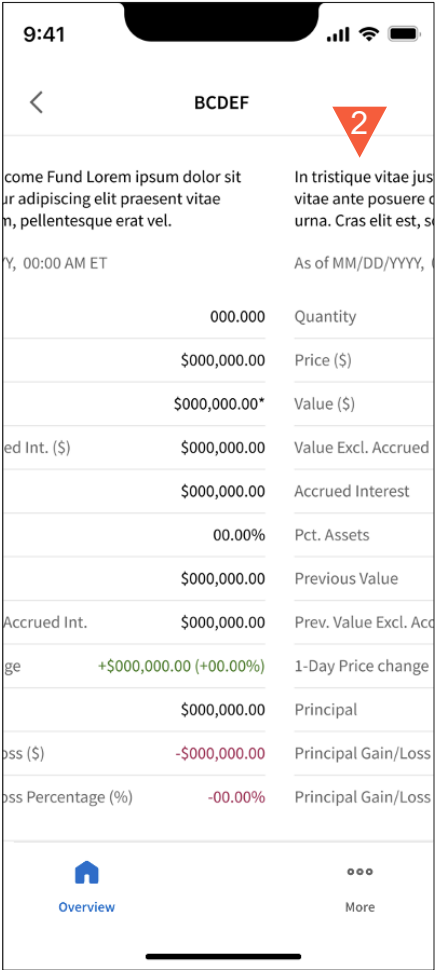
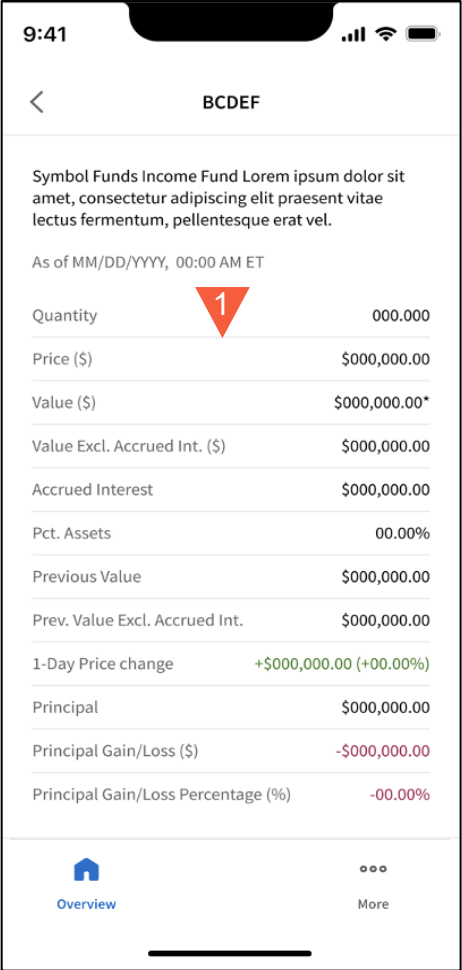
Security Details Card

- 1 The Details card will have more expansive data.
- 2 You will now be able to swipe left/right to go from one security detail card to another.

Original



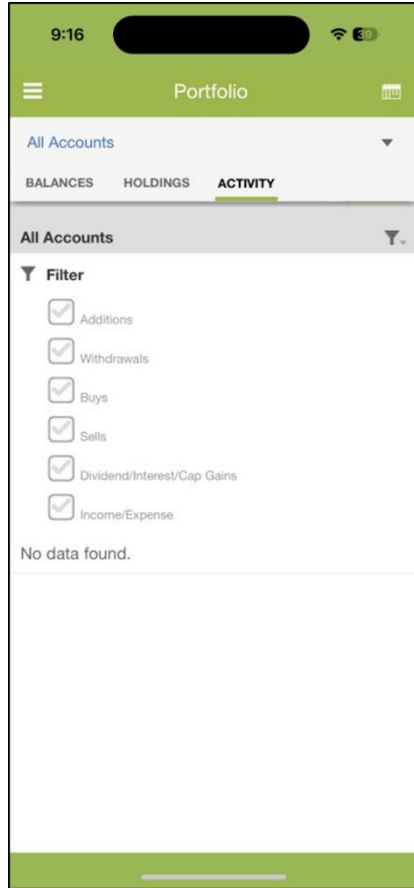
Redesigned



Activity Filters/Sort

- 1 Expanded the Date Range filter options.
- 2 Enhanced experience to select how the activity data is sorted.

Original



Redesigned

