

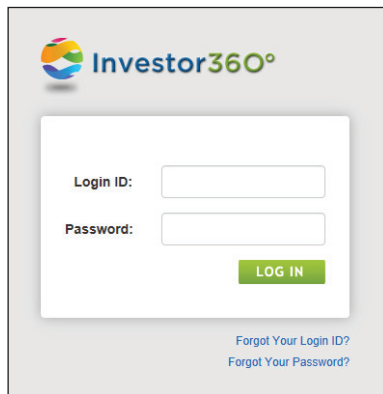
## INVESTOR360<sup>®</sup>: LOGGING IN TO YOUR ACCOUNT

### First-time user

Prior to logging in to Investor360<sup>®</sup>, obtain your login ID and “one-time” password from your advisor.

**Please note:** Should you have any difficulties with your account, please contact your advisor for help.

1. Go to [www.investor360.com](http://www.investor360.com), enter your login ID and temporary password, and click **Log In**.



2. The user agreement displays. Read through the agreement and click **I Agree**.
3. The first time you log in, you will be brought automatically to the Settings window to complete the following profile information:

Personal Information	Identify the person who will own the ID by first and last name. The designated user will still be able to view all accounts linked to the ID, but he or she will be able to edit only those accounts associated with his or her social security number.
Email	Enter your email address. This email is used to alert you of any errors or issues with your account.
Confirm Email	Confirm your email address.
Current Password	Enter your default password to verify your identity before creating a new password.
New Password	Create a new password. Passwords must have at least eight characters and include three of the following four character categories: uppercase letters, lowercase letters, numbers, and special characters (e.g., @, #, \$).
Confirm Password	Confirm the password.
Secret Question 1	Select a security question from the dropdown menu. If you ever forget your password, we'll use these questions to identify who you are and help you create a new password. For instructions on how to reset your password, please see below.
Answer 1	Enter the answer to Secret Question 1.
	<b>Please note:</b> Answers are <i>not</i> case sensitive.

- Secret Question 2      Select a security question from the dropdown menu.
- Answer 2                Enter the answer to Secret Question 2.
- Paperless Preferences    You may sign up to go paperless and receive electronic versions of statements and confirms. Once you go paperless, you will stop receiving these documents in the mail and will receive an email notifying you that they are available within Investor360°.

**Please note:** All information is required.

4. Click **Save**. Your Investor360° account has been created, and the Overview tab appears. To log in to Investor360° in the future, simply enter the login ID given to you by your advisor and the new password that you created.

**Existing user**

To log in as an existing user, please follow the steps below:

1. Go to [www.investor360.com](http://www.investor360.com).
2. Enter your login ID and password.
3. Click **Log In**.

Settings

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**Personal Information**

First Name:

Last Name:

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**E-Mail**

E-Mail\*:

Confirm E-Mail\*:

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**Password**

Current Password\*:

New Password\*:

Confirm Password\*:

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**Secret Questions**

Secret Question 1\*:

Answer 1\*:

Secret Question 2\*:

Answer 2\*:

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**Paperless Preferences**

Choose e-delivery by checking the box next to the documents and notifications. If you wish to continue to receive documents in the mail, leave the box unchecked. [\(Why don't I see all accounts?\)](#)

Check all account and document types for e-delivery to the person listed above.

**Jane Doe Individual NFS - (B37111222)**

Confirms  Statements

Customer Correspondence  Shareholder Reports

Tax Documents

Deliver to:

E-mail:

**John Doe IRA NFS - (B37123456)**

Confirms  Statements

Customer Correspondence  Shareholder Reports

Tax Documents

Deliver to:

E-mail:

By selecting e-delivery, you are acknowledging that you have read the [Electronic Notification Agreement](#).