



## INVESTOR360°®: LOGGING IN TO YOUR ACCOUNT

### First-time user

Prior to logging in to Investor360°® 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**.

A screenshot of the Investor360° login interface. It features a logo at the top left with the text "Investor360°". Below the logo is a central login form with two text input fields: "Login ID:" and "Password:", and a green "LOG IN" button. At the bottom of the form are two links: "Forgot Your Login ID?" and "Forgot Your Password?".

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.

**Please note:** Answers are *not* 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**

**Personal Information**

First Name: John  
Last Name: Smith

**E-Mail**

E-Mail\*: john@test.com  
Confirm E-Mail\*: john@test.com

**Password**

Current Password\*: Current Password  
New Password\*: Password  
Confirm Password\*: Confirm Password

**Secret Questions**

Secret Question 1\*: City of birth  
Answer 1\*:   
Secret Question 2\*: First pet's name  
Answer 2\*:

**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: JANE DOE  
E-mail: john@test.com

John Doe IRA NFS - (B37123456)

Confirms [?](#)  Statements [?](#)  
 Customer Correspondence [?](#)  Shareholder Reports [?](#)  
 Tax Documents [?](#)

Deliver to: JOHN DOE  
E-mail: john@test.com

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

**SUBMIT**