

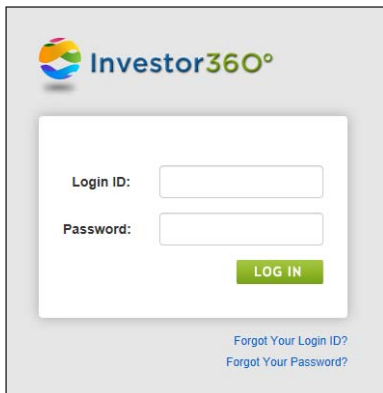
INVESTOR360°®: LOGGING IN TO YOUR ACCOUNT

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.net, 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 automatically be brought to the Settings window to complete the following profile information:

Email	Enter your e-mail address. This e-mail is used to alert you of any errors or issues with your account.
Confirm Email	Confirm your e-mail address.
Password	Create a new password. Passwords must be eight characters long and contain at least one number.
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 Security Question 1. Please note: Answers are <i>not</i> case sensitive.
Secret Question 2	Select a security question from the dropdown menu.
Answer 2	Enter the answer to Security 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 e-mail notifying you that they are available within Investor360°

Please note: All information is required.

Settings

Personal Information

First Name:

Last Name:

Email:

Confirm Email:

First-time users should create a new Investor360° password.

Password:

Confirm Password:

Secret Questions

Secret Question 1:

City of birth

Answer 1:

Secret Question 2:

Last name of your childhood doctor (do not include Dr.)

Answer 2:

Paperless Preferences

E-Delivery:

☐ No e-Delivery
 ☒ Some documents or some accounts

The Living Trust of Timothy and Jane Smith - HDM1234567

Deliver to:

☐ Select All
 ☒ Statements
 ☐ Confirms

CANCEL

SAVE

- Click **Save**. Your Investor360° account is now 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:

- Go to www.investor360.net.
- Enter your login ID and password.
- Click **Log In**.