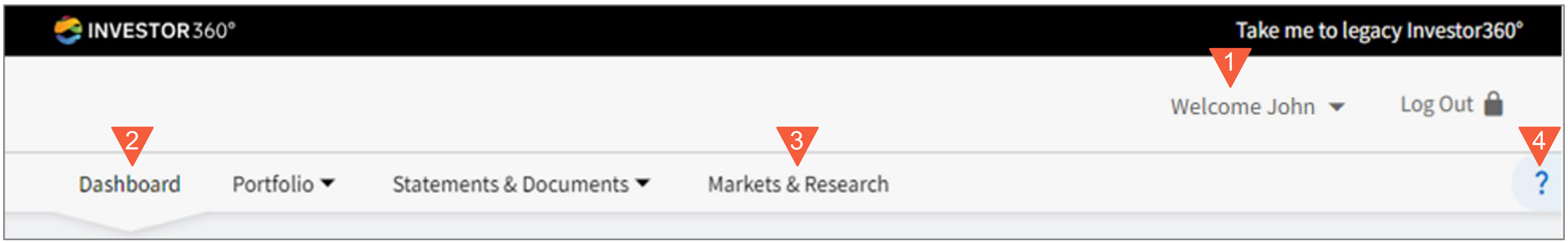
Commonwealth

Investor360° Popular Features

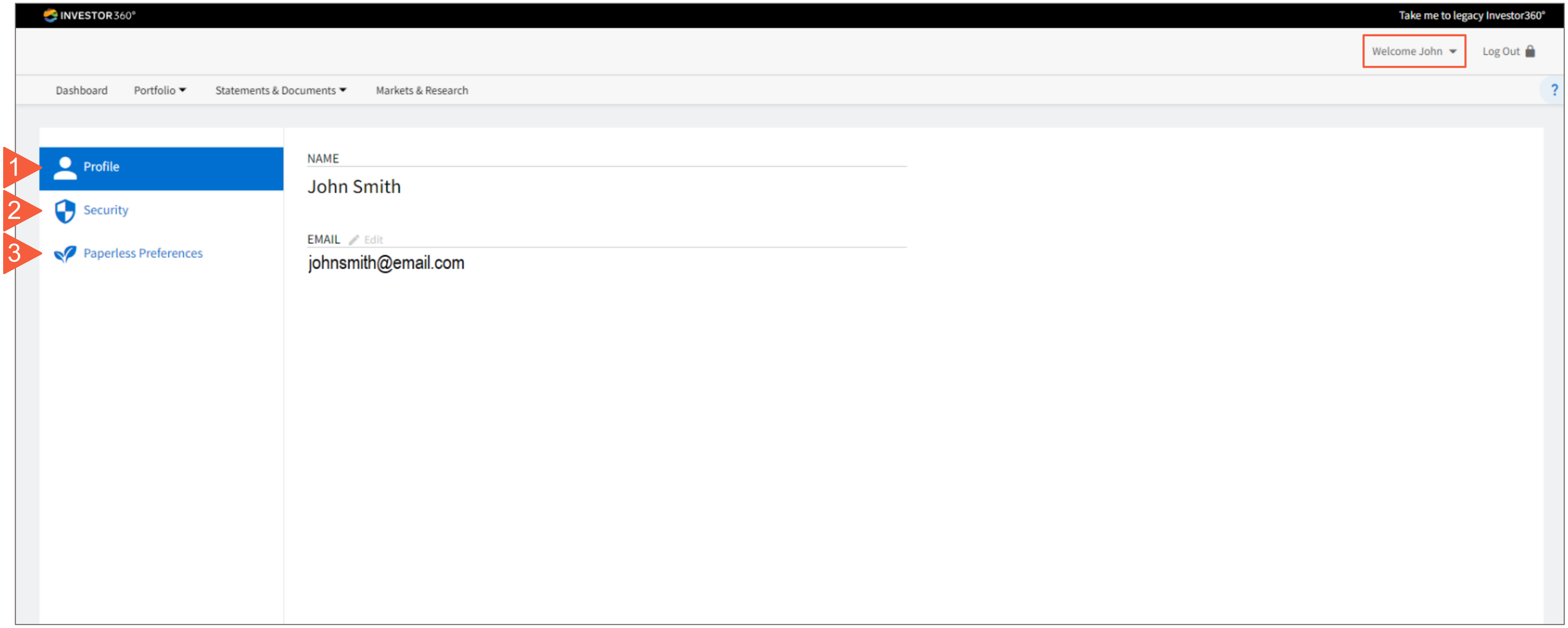
Investor360° has a collection of features to help you navigate through your financial portfolio with ease. This resource introduces you to the most commonly used features once you sign into investor360.com. And, to learn even more, don't forget to refer to the in-app help (click the question mark icon) for more information.

Toolbar Options



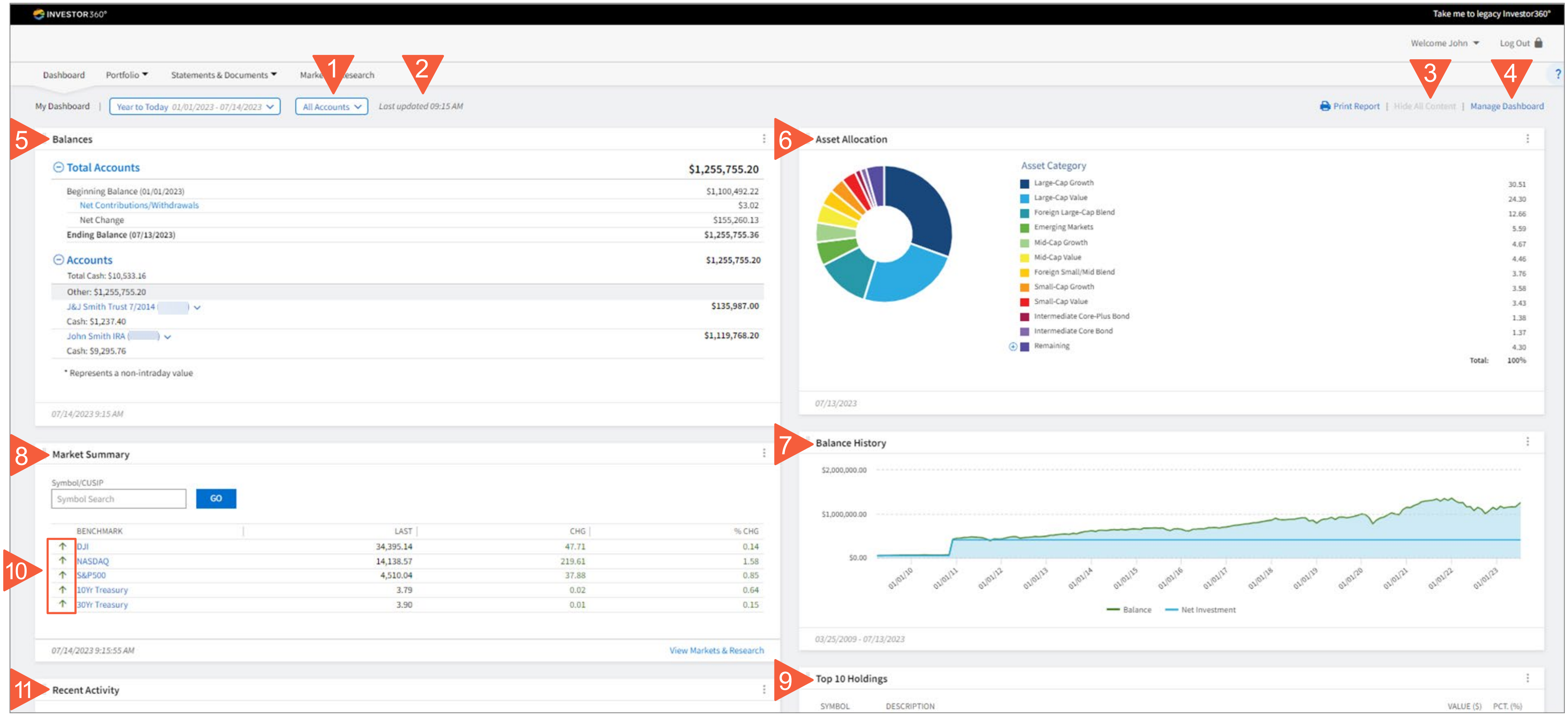
1	**Welcome**	Settings menu dropdown presents an all-in-one entry point to profile information, security, and paperless preferences.
2	**Dashboard**	The default landing page, Dashboard displays a consolidated view of widgets that contain data about your portfolio.
3	**Markets & Research**	Markets & Research includes a Dashboard widget that tracks your favorite stocks.
4	**In-App Help**	A universal help button is located throughout the platform, in the upper right corner of each page.

Name Dropdown Menu (Go to Welcome dropdown menu showing your name)



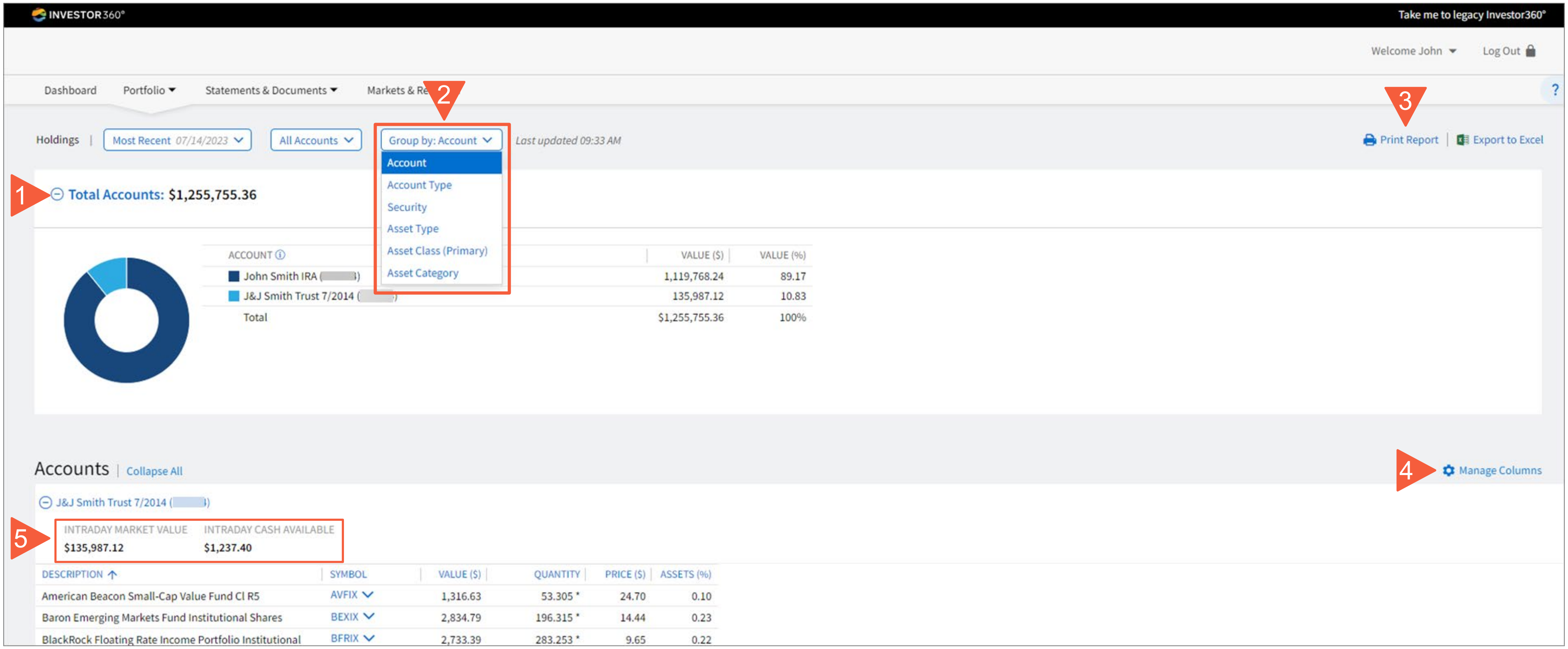
1	**Profile**	Personal information and the user's email address is under Profile.
2	**Security**	Password and security questions are available under Security, along with multifactor authentication (MFA) settings, allowing you to add, remove, and change the settings of any registered device.
3	**Paperless Preferences**	Elect and manage paperless preferences for e-delivery of account documents.

Dashboard Tab



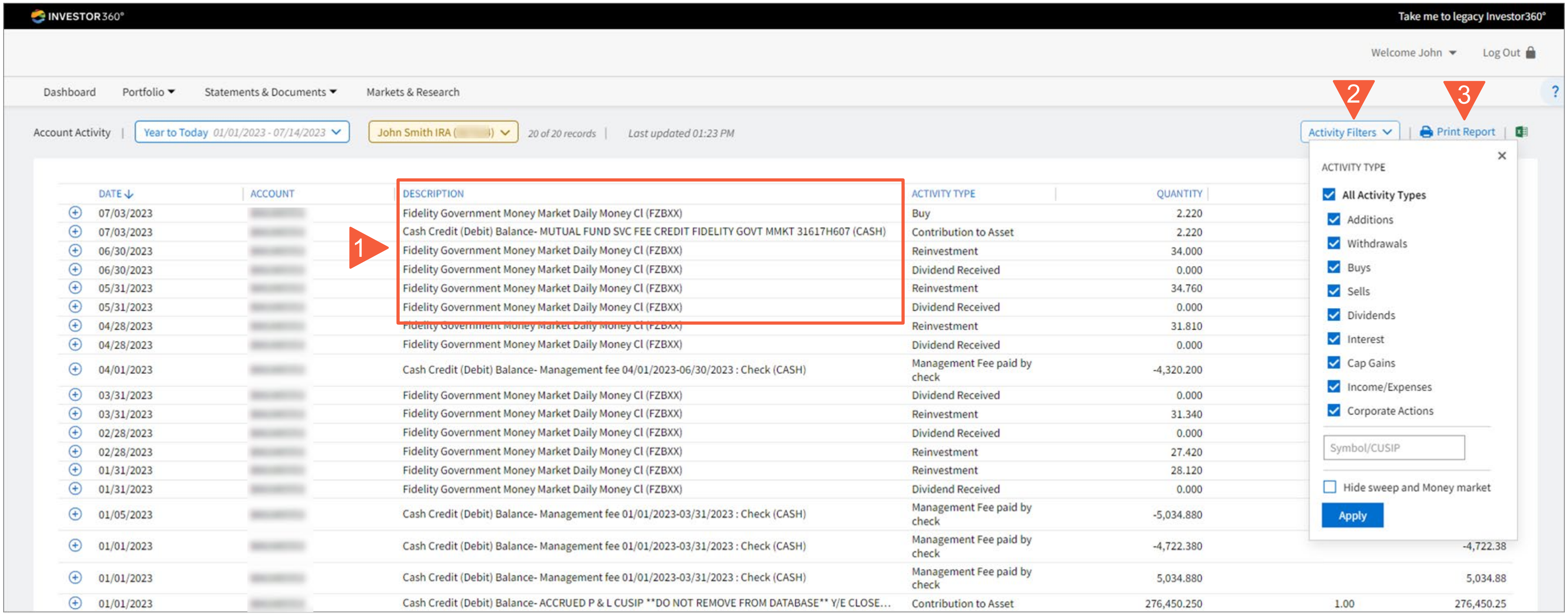
1	**Account Selector**	Allows you to select a subset of your accounts or create a Quick Group
2	**Time stamps**	Widget- and page-specific time stamps
3	**Hide all/Show all**	Minimizes or expands all widgets for additional security
4	**Manage Dashboard**	Allows you to add, remove, or configure your dashboard widgets
5	**Balances**	Displays balances for accounts, including available cash and intraday value
6	**Asset Allocation**	View asset category and asset class (x-ray or primary) charts by adjusting the settings
7	**Balance History**	Graphical presentation of a portfolio's value over time by balance or net investment
	Additional Widgets	8 Market Summary | 9 Top Holdings | 11 Recent Activity
10	**Market Summary arrows**	Up arrows are green; down arrows are red.

Holdings (Go to Portfolio tab > Holdings subtab)



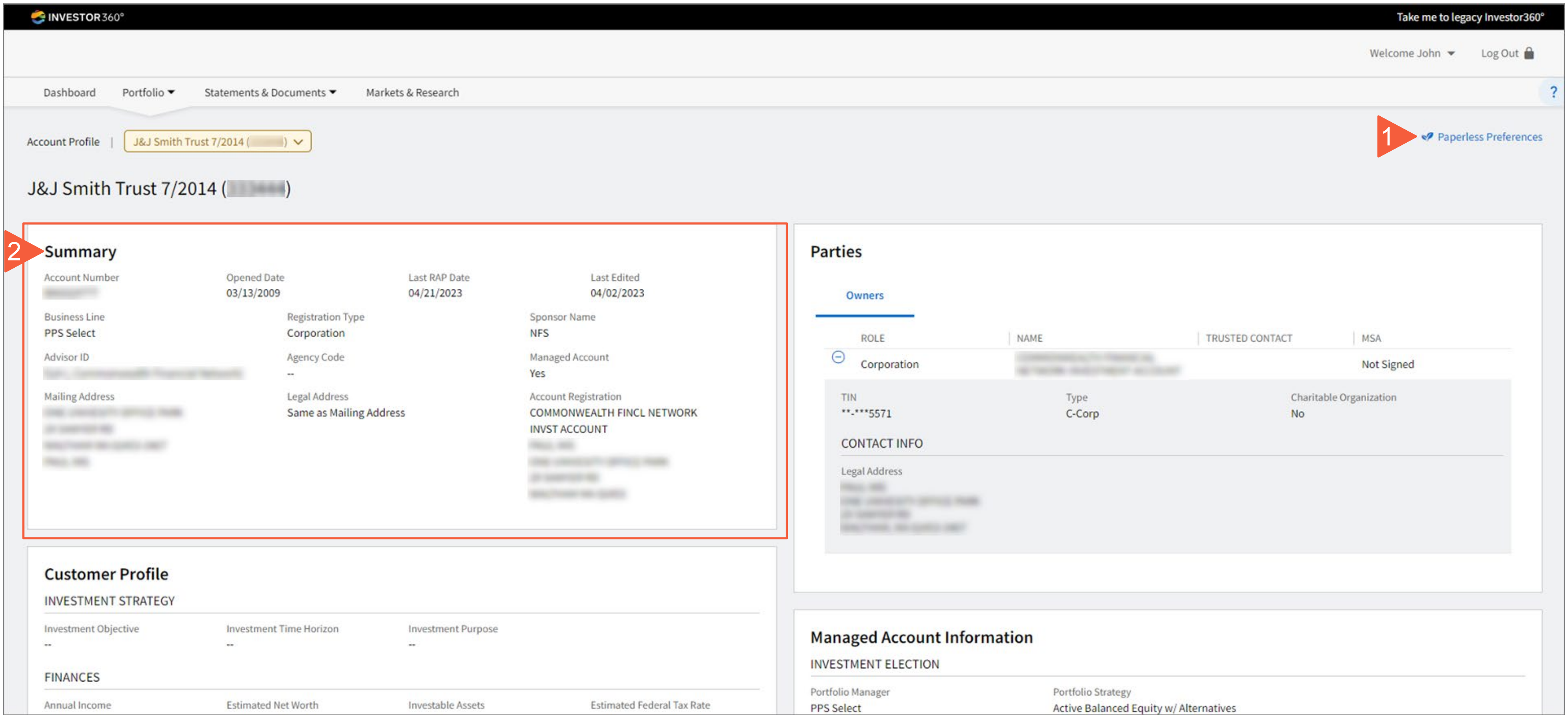
1	**Header**	Displays total value of selected accounts (When expanded, it displays a graphic and table showing holding allocations.)
2	**Group by filter**	Robust account-grouping filter
3	**Print button**	Print information from this view
4	**Manage Columns**	Column customization for the information displayed; columns description and symbol will always display
5	**Intraday labels**	Most recent view represents real-time value for NFS accounts; non-intraday values identified with an asterisk

Account Activity (Go to Portfolio tab > Account Activity subtab)



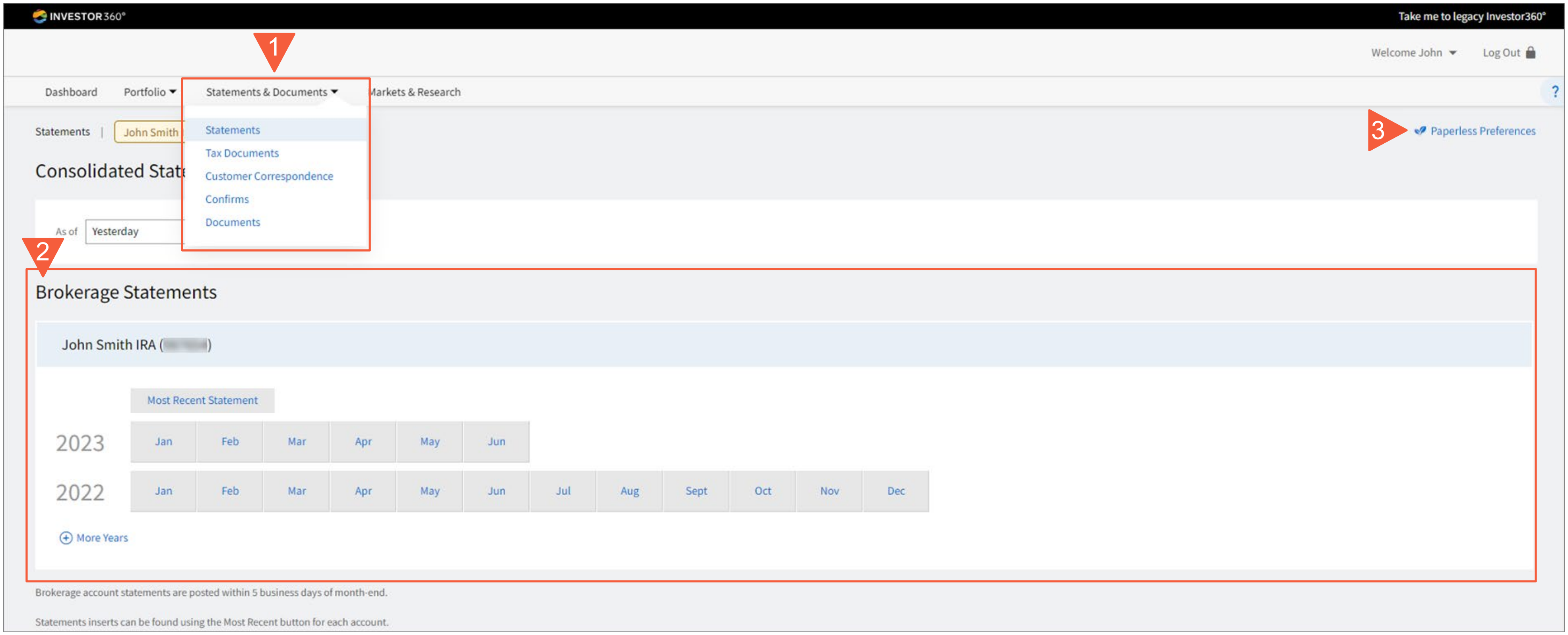
1	**Description**	Expandable activity description line
2	**Activity Filters**	Activity filter dropdown menu for quick view of specific transactions
3	**Print Report**	Action to print report

Account Profile (Go to Portfolio tab > Account Profile subtab)



1	**Paperless Preferences**	Link to Paperless Preferences settings tab
2	**Summary**	To find account information quickly, account attributes and information are grouped together within a collection of tiles.

Statements & Documents Tab



1	**Statements & Documents**	Subtabs include **Statements** | **Tax Documents** | **Customer Correspondence** | **Confirms** | **Documents**
2	**Paperless Preferences**	Individual accounts are shown as tile views on Statements, Tax Documents, Customer Correspondence, and Confirms pages.
3	**Brokerage Statements**	Link to Paperless Preferences settings tab

Documents: View documents shared by your advisor and share documents securely with them by using the Upload feature.