INVESTOR360°® MOBILE

QUICK REFERENCE GUIDE

COMMONWEALTH *financial network*

TABLE OF CONTENTS

Investor360°® Mobile: Quick Reference Guide **1**

1. Logging in 1

2. The Overview subtab 2

3. The Balances subtab 2

4. The Holdings subtab 3

5. The Activity subtab 4

Investor360°®

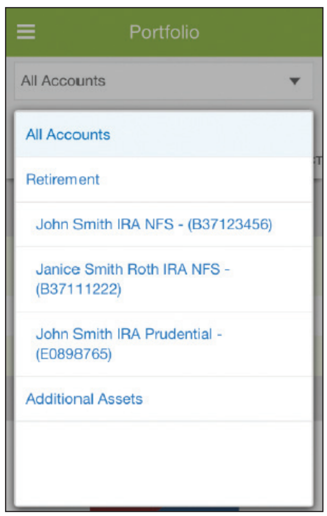
Investor360°® Mobile: Quick Reference Guide

Commonwealth's Investor360°® Mobile app, optimized for smartphones running Apple iOS 7.1 or above or Android OS 4.4.2 or above, makes it possible for you to review your account information from a mobile device.

1. LOGGING IN

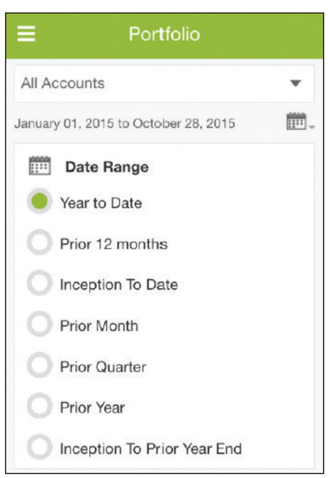
Enter your username and password into the respective fields and press **Login**.

Once logged in, you can elect to view information for all your accounts, a group of accounts, or just one individual account. To change this selection, tap the **All Accounts** dropdown menu.



In addition, you are able to change the date range that is visible by tapping the icon. The date range choices are:

- Year to Date
- Prior 12 months
- Inception To Date
- Prior Month
- Prior Quarter
- Prior Year
- Inception To Prior Year End

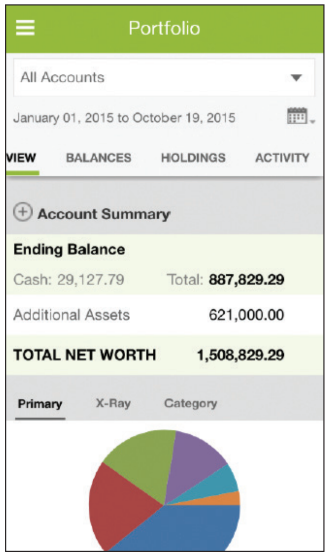


2. THE OVERVIEW SUBTAB

This subtab displays your account summary. By default, Cash and Additional Assets are visible. To see more details, such as Additions and Withdrawals, you can tap the ⊕ symbol next to Account Summary.

Similar to the browser-based Investor360° webpage, the app's pie chart gives you three viewing options:

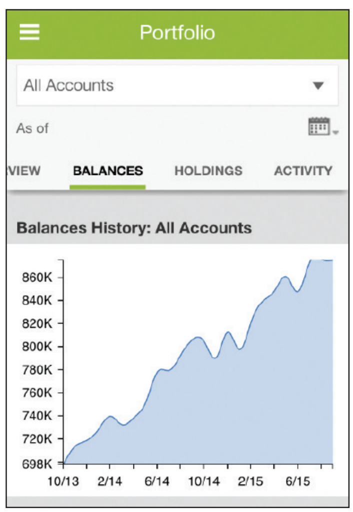
1. Primary
2. X-Ray
3. Category



3. THE BALANCES SUBTAB

The Balances subtab displays the balance history in a graph at the top, mapped out in four-month increments.

This subtab also shows the balance information for each account. If your advisor has entered additional assets for you in Client360°® these assets will be displayed below the account balance information with the Ⓜ icon next to each.

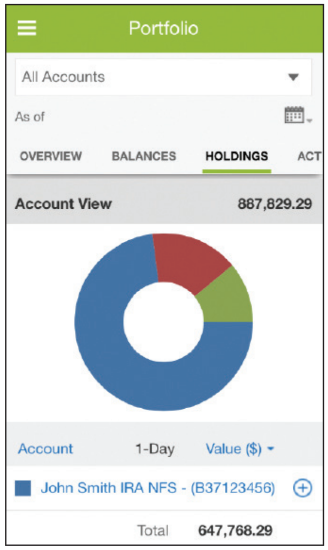


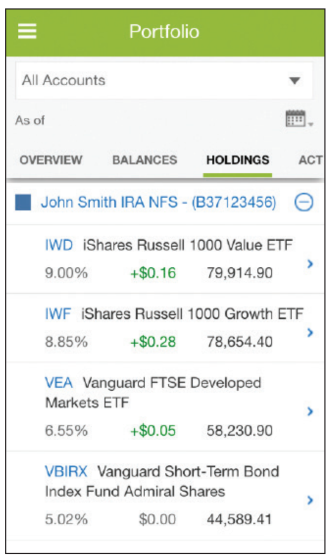
4. THE HOLDINGS SUBTAB

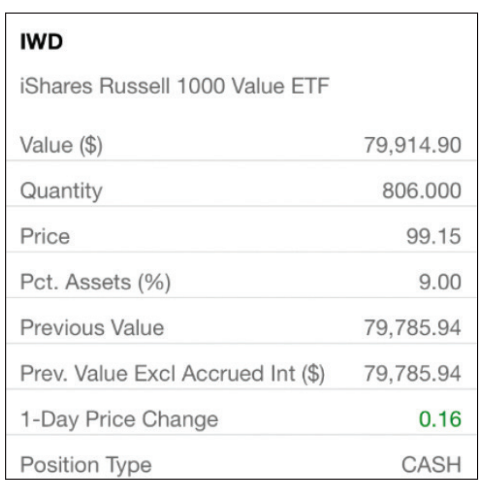
At the top of this tab, all holdings are displayed in a pie chart. Each color represents a different account.

Below the chart, each account's name, number, and total are displayed. To see more information about an account, such as individual holdings within that account, you can tap the icon.

When viewing an individual account on the Holdings subtab, you can view additional information about that holding by tapping the icon. The holding information will then display.







5. THE ACTIVITY SUBTAB

The Activity subtab displays all activities on your account(s) in chronological order.

You can elect to filter this information by type by tapping the icon, selecting what you would like to view, and tapping **Done**.