

## INVESTOR360<sup>®</sup> MOBILE

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QUICK REFERENCE GUIDE

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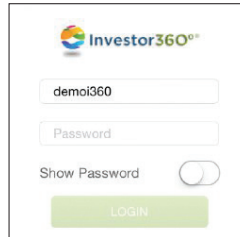
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## Investor360<sup>®</sup> Mobile: Quick Reference Guide

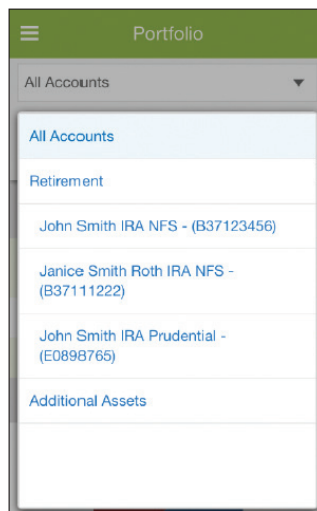
Commonwealth's Investor360<sup>®</sup> Mobile app, optimized for smartphones running Apple iOS 7.1 or above or Android OS 4.4.2 or above, makes it possible for you to review your account information from a mobile device.


### 1. LOGGING IN

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

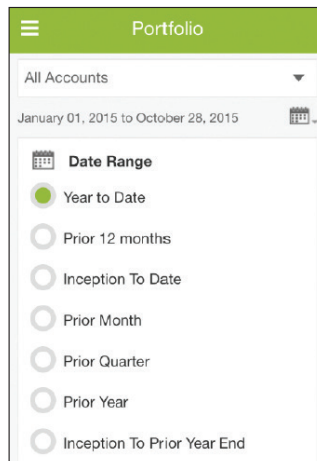


Once logged in, you can elect to view information for all your accounts, a group of accounts, or just one individual account. To change this selection, tap the **All Accounts** dropdown menu.




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

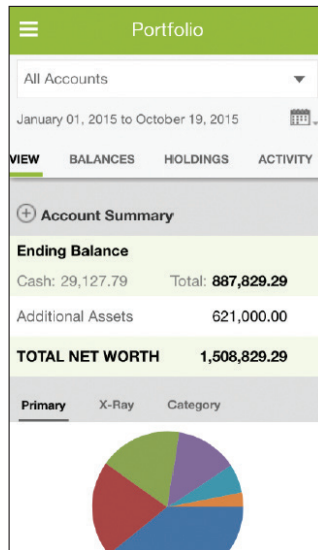


## 2. THE OVERVIEW SUBTAB

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:

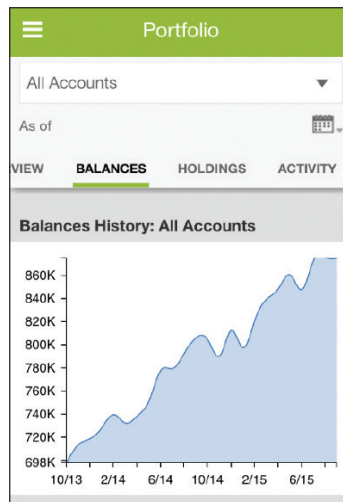
1. Primary
2. X-Ray
3. Category



## 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.

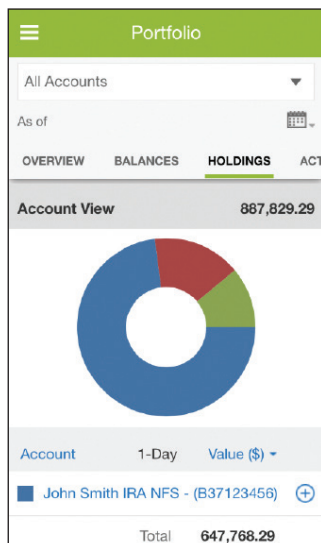


#### 4. THE HOLDINGS SUBTAB

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.




The screenshot shows the 'Portfolio' screen with the 'HOLDINGS' subtab selected, focusing on the 'John Smith IRA NFS - (B37123456)' account. The account name is at the top with a minus icon. Below is a list of holdings with columns for ticker, name, yield, price change, and value. Each row has a right arrow icon for more details.

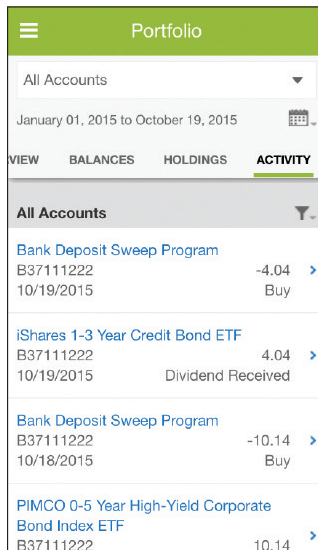
Ticker	Name	Yield	Price Change	Value
IWD	iShares Russell 1000 Value ETF	9.00%	+\$0.16	79,914.90
IWF	iShares Russell 1000 Growth ETF	8.85%	+\$0.28	78,654.40
VEA	Vanguard FTSE Developed Markets ETF	6.55%	+\$0.05	58,230.90
VBIRX	Vanguard Short-Term Bond Index Fund Admiral Shares	5.02%	\$0.00	44,589.41

<b>IWD</b>	
iShares Russell 1000 Value ETF	
Value (\$)	79,914.90
Quantity	806.000
Price	99.15
Pct. Assets (%)	9.00
Previous Value	79,785.94
Prev. Value Excl Accrued Int (\$)	79,785.94
1-Day Price Change	0.16
Position Type	CASH

## 5. THE ACTIVITY SUBTAB

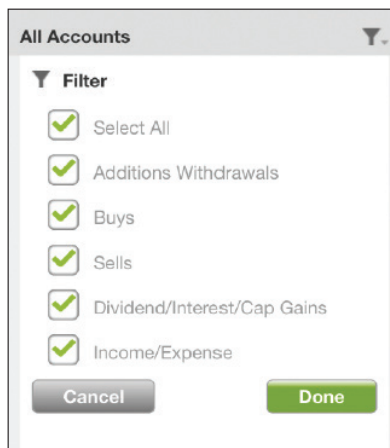
The Activity subtab displays all activities on your account(s) in chronological order.

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



The screenshot shows the 'Portfolio' screen with the 'ACTIVITY' subtab selected. The date range is 'January 01, 2015 to October 19, 2015'. The activity list includes:

Account	Amount	Type
Bank Deposit Sweep Program B37111222	-4.04	Buy
iShares 1-3 Year Credit Bond ETF B37111222	4.04	Dividend Received
Bank Deposit Sweep Program B37111222	-10.14	Buy
PIMCO 0-5 Year High-Yield Corporate Bond Index ETF B37111222	10.14	



The screenshot shows the 'All Accounts' filter dialog box. It contains a 'Filter' section with the following options, all of which are checked:

- Select All
- Additions Withdrawals
- Buys
- Sells
- Dividend/Interest/Cap Gains
- Income/Expense

Buttons for 'Cancel' and 'Done' are located at the bottom of the dialog.