

Investor360° Setup

Reference Guide

Investor360° is a simple and convenient way for clients like you to view the information you value most. Use this guide to set up Investor360° on your computer and mobile device.

How to set up?

1. From a **desktop/laptop computer**, go to www.investor360.com.
2. Enter your **login ID** and **temporary password** you received from your financial professional. Note: You should have received two emails: one email with your client login ID and one email with your temporary password.
3. Select **Log In**.

Multi-Factor Authentication

Multi-factor authentication (MFA) uses more than one kind of verification to ensure that the person logging in is who they say they are. MFA ensures a secure, verified connection every time you log in to Investor360.com.

How it Works

1. If you have not configured MFA, choose a method to receive a passcode.
 - Either **Text**, **Voice/Phone Call** or **PingID App**
2. If you have configured MFA, the device you selected will receive a message containing a passcode.
 - *If using PingID, you need to open the app on your smartphone to authenticate. See Using PingID Method below for more info.*
3. Enter the **passcode** you received. You are now securely logged in to Investor360.com.

Using PingID App Method

1. You will be asked if you already have PingID installed. If not, enter your email address or phone number to receive a download link. (View the email or text you received on your mobile device.)
2. Download PingID to your mobile device using the App Store (iPhone) or Google Play (Android). Opens the app and ensure it is configured correctly.
3. Select PingID at the Investor360° prompt, then you will receive an authentication request on your device.
4. Approve the authentication request using your mobile device. The Investor360° login completes automatically.

Examples of authentication factors:

- Password plus a text message to a registered device
- Password plus a phone call to a registered device
- Password plus authentication on a registered device

Using Text or Voice/Phone Call Method

1. You will receive a text or phone call with a one-time code.
2. Enter this code in the **Authenticate window** of Investor360.com and select Sign On.
3. If this is the first time a device was used, you will be shown a list of all registered devices.
4. You will need to select **Submit Registration** to add the new device.
5. You will be encouraged to register multiple devices. If you have multiple devices registered, you can select Change Device at the authentication screen.

Setting up Your Profile

1. Accept the **Terms and Conditions**.
2. Choose a user from the **User of this ID** drop-down menu. This assigns the login ID to a user. The designated user can still access all accounts, but can only edit accounts associated with their login ID.
3. Enter your profile information in the **Settings** screen.
4. Create and answer the two **Secret questions**.
5. Select **Save**.

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How to download the Investor360° Mobile app?

In order to successfully log into the mobile Investor360° application, you first need to log into the browser-based version of Investor360°. See steps above to do this.

To download the Investor360° app, navigate to the application store on your mobile device:

Apple/iOS Devices – App store



Android Devices – Google Play store



1. Select Get/Install.
2. Select Open to launch Investor360°.
3. Enter your login ID and password.
4. Select Login to access your account.

Resetting Your Password

1. Go to www.investor360.com.
2. Select Forgot Your Password?
3. Enter your login ID and select Next.
4. Follow the on-screen instructions to create a new password.

Recovering Your Login ID

If you forgot your login ID, call your financial professional.

Editing Account Settings

Use the **Settings** screen to update your account profile, including email address, password, security questions, and paperless preferences.

1. From within Investor360°, select **Settings**.
2. Make your changes and select **Save**.