

INVESTOR360[°]® MOBILE

QUICK REFERENCE GUIDE

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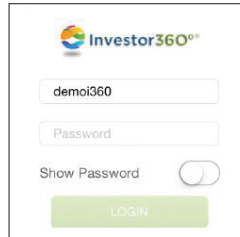
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Investor360® Mobile: Quick Reference Guide

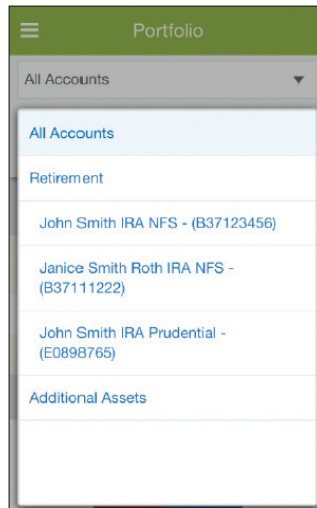
Commonwealth's Investor360® Mobile app, optimized for smartphones running Apple iOS 7.1 or above or Android OS 4.4.2 or above, makes it possible for your clients to review their account information from their mobile devices.


1. LOGGING IN

Your client will enter his or her username and password into the respective fields and press **Login**.

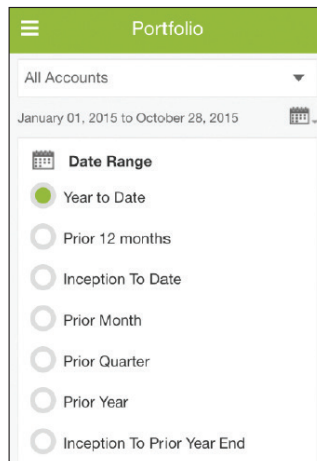


Once logged in, your client can elect to view information for all of the accounts, a group of accounts, or just one individual account. To change this selection, your client can tap the **All Accounts** dropdown menu.




In addition, your client is 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

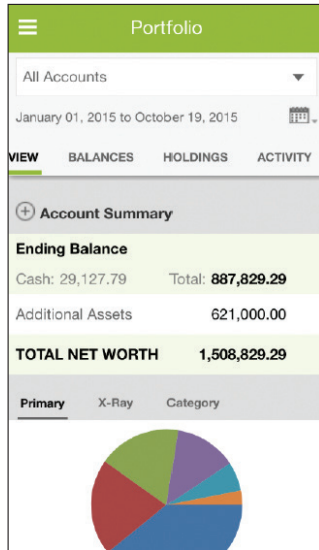


2. THE OVERVIEW SUBTAB

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


Similar to the browser-based Investor360® webpage, the app's pie chart gives your client three viewing options:

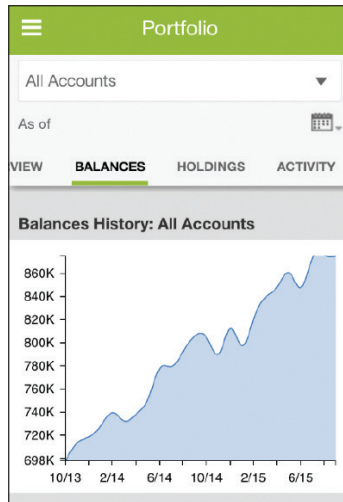
1. Primary
2. X-Ray
3. Category



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 you've entered additional assets for your client in Client360®, these assets will be displayed below the account balance information with the  icon next to each.

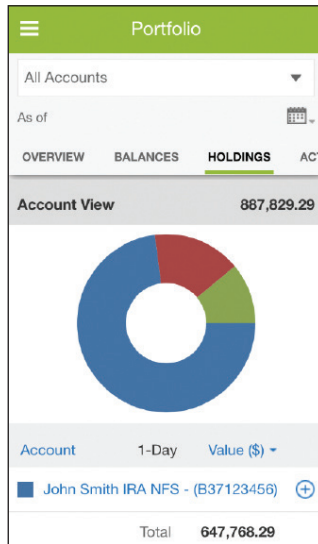


4. THE HOLDINGS SUBTAB

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, your client can tap the  icon.

When viewing an individual account on the Holdings subtab, your client 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. The account 'John Smith IRA NFS - (B37123456)' is selected, indicated by a minus icon. The holdings are listed in a table with columns for ticker, name, yield, price change, and value. Each row has a right arrow icon.

| 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 |

| IWD | |
|-----------------------------------|-----------|
| 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 client's account(s) in chronological order.

Your client can elect to filter this information by type by tapping the  icon, selecting what he or she would like to view, and tapping **Done**.

