



## VIEW YOUR ENTIRE FINANCIAL LIFE ONLINE, ALL IN ONE PLACE

INVESTOR360® GIVES YOU THE POWER TO SEE AN EXECUTIVE SUMMARY OF YOUR FINANCIAL LIFE, WHENEVER YOU WANT, FROM ANY INTERNET CONNECTION.

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### SEE EVERYTHING IN A SINGLE PLACE WITH ONE EASY-TO-USE CONNECTION

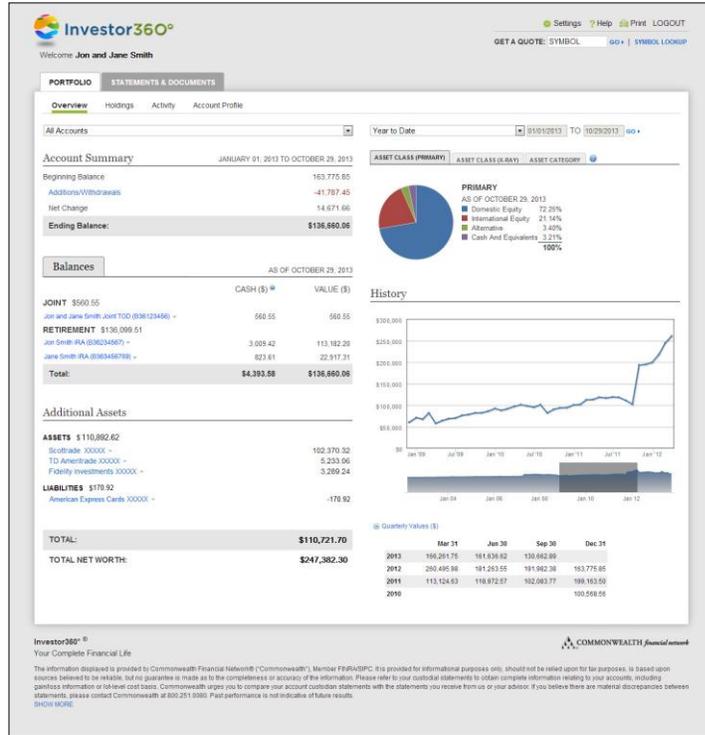
Investor360® lets you view much of the same information we do when managing your accounts. You can:

- **See your account balances** and a detailed position breakdown for each account as of any date range, including accounts not held with us.
- View balances and positions, as well as performance, for all your accounts held with us in **one easy-to-read, consolidated report**.
- **Check on recent transactions** within your accounts.
- **Link to other accounts**, such as your spouse's or children's, held with us. (Restrictions may apply; contact us for details.)
- **Review important facts**, such as your account setup and contact information, listed beneficiaries, and other named individuals.
- View important paperwork our office has shared with you in a **secure document vault**.
- **Eliminate paper statements** and view or download current and historical account statements and trade confirms online.
- **Get real-time price quotes** and charts for traded securities.
- **Run in-depth reports** to get even more information on your accounts.
- **Import account information to TurboTax** for easier, more efficient tax filing.

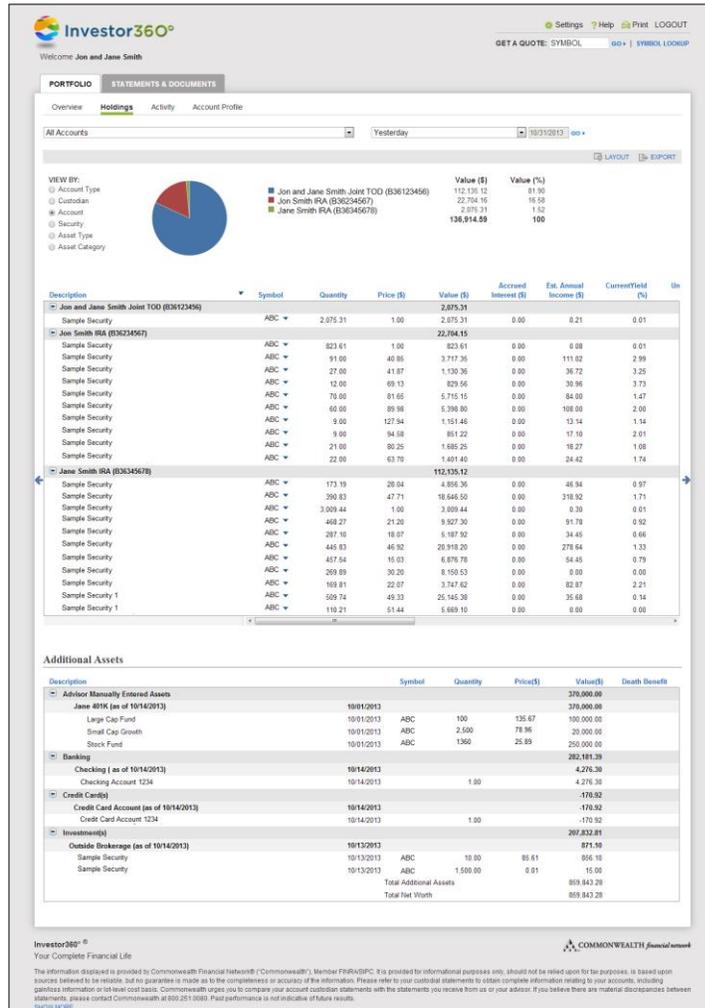
### EASY TO USE, EASY TO UNDERSTAND

Investor360® works with today's most popular Internet browsers, including Internet Explorer, Firefox, Safari (for Macintosh), and Chrome. Just log on and point and click to manage, monitor, and navigate within your accounts however you like:

**Overview** displays your accounts and their current values, as well as asset allocation, performance, and benchmark information, and provides charts of your current net worth and historical values.



**Holdings** shows you all your holdings (even those held elsewhere) at various levels (i.e., by asset and by asset category) with the option to group them either by account or by securities held across all accounts. It also allows you to export data directly to Excel. Choose from up to 20 columns of data that are most important to you.



**Additional Assets** lets you add account information from outside sources and view it all through Investor360°

[+ Add/Edit Additional Assets](#)

<b>ASSETS</b> \$859,843.28	
Savings	68.38
Checking	4,276.30
Brokerage Account A	-170.92
Ben's 529 Plan	0.00
Jane IRA Account	5,233.06
Outside Account	3,289.24
Joint Account	102,370.32
Brokerage Account B	871.10
Checking	277,836.71
Money Market	0.00
Insurance Policy	96,069.09
Brokerage Account B	0.00
Brokerage Account B	370,000.00

**Activity** details all your account activity, such as buys and sells, dividends, and adjustments, and allows you to view realized gain/loss information. Smart filters make it easy to drill down into an activity to find what you are looking for.

Investor360°  
 Welcome Jon and Jane Smith  
 Settings Help Print LOGOUT  
 GET A QUOTE: SYMBOL GO SYMBOL LOOKUP

PORTFOLIO STATEMENTS & DOCUMENTS  
 Overview Holdings **Activity** Account Profile

All Accounts Prior Month 10/01/2013 TO 10/31/2013

Date	Account	Activity Type	Description	Quantity	Price (\$)	Amount (\$)
10/01/2013	B36123456	Reinvestment	Sample Security	1.15	21.26	-24.39
10/01/2013	B36234567	Dividend Received	Sample Security	0.00	0.00	24.39
10/03/2013	B36123456	Sell	Sample Security	-333.21	1.00	333.21
10/30/2013	B36345678	Contribution to Asset	Sample Security	1,514.76	1.00	1,514.76
10/30/2013	B36123456	Buy	Sample Security	1,514.76	1.00	-1,514.76
10/31/2013	B36234567	Reinvestment	Sample Security	0.02	1.00	-0.02
10/31/2013	B36123456	Interest Income	Sample Security	0.00	0.00	0.02

Investor360°  
 Your Complete Financial Life  
 COMMONWEALTH Financial Network

The information displayed is provided by Commonwealth Financial Network® ("Commonwealth"), Member FINRA/SIPC. It is provided for informational purposes only, should not be relied upon for tax purposes, is based upon sources believed to be reliable, but no guarantee is made as to the completeness or accuracy of the information. Please refer to your custodial statements to obtain complete information relating to your accounts, including gain/loss information or to view cost basis. Commonwealth urges you to compare your account custodian statements with the statements you receive from us or your advisor. If you believe there are material discrepancies between statements, please contact Commonwealth at 800.221.0000. Past performance is not indicative of future results.  
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**Account Profile** lists the addresses on file for your account, holding instructions, and any listed beneficiaries.

**Reports** provides you with access to many of the same reports we use, so you can take a more in-depth look at your accounts.

**Investor360**  
Welcome Jon and Jane Smith

Settings Help Print LOGOUT  
GET A QUOTE: SYMBOL GO SYMBOL LOOKUP

PORTFOLIO STATEMENTS & DOCUMENTS

Overview Holdings Activity **Account Profile**

B3612456 - Jon Smith IRA RFS

### Account Summary

Account Number:	B3612456	Contract Date:	08/03/2006	Initial Funding:	\$0.00
Account Reg:	IRAF	Open Date:	06/13/2006	Business Line:	PPS Custom
Account Name:	IRAF FBO JON SMITH 1 MAIN ST. WALTHAM MA 02453	Close Date:		PPS Strategy:	
Reg Type:	IRA	Managed Account:	Yes	Advisory Investment:	
Sponsor:	RFS	Fee Authorization:		Objective:	Primarily Equity
Advisor ID:	091 (Low Advisor)				
Executing IRA:	COMMONWEALTH				
Status Code:	Open				
Gov Entity:	MA				

### Client Information

<b>GENERAL INFORMATION</b>	<b>ACCOUNT PAPERWORK</b>	<b>RELATED PARTIES</b>
Number: B3612456	Application: ON FILE	Trading Authority: Jon Advisor
Reg Type: IRA	Margin Agreement: Not on file	Interested Parties: None
Tax ID: xxx-xx-1234	Option Status: Not on file	
ID Type: SSN	Option Level: Not provided	
Short Name: SMITH	Standing Distribution: Retirement Standing Distribution	
Established: 06/13/2006	on file - Level 2	
Updated: 05/21/2013	Proceeds	
Last Rep Date: N/A	Instructions: HOLD PROCEEDS	
Advisor ID: 001	Securities	
Restrictions: N/A	Instructions: HOLD IN STREET NAME	
	Dividend Instructions: PAY ALL TO CASH AS PROCEEDS	

<b>BENEFICIARY INFORMATION</b>	<b>NAMES ON THIS ACCOUNT</b>	<b>ACCOUNT ADDRESS INFORMATION</b>
Name: Alex Smith	Jon Smith (Primary)	Mailing Address: 1 Main Street
Designation: PRIMARY	SSN: xxx-xx-1234	Waltham, MA 02453
Percentage: 25	Birth Date: 01/06/1932 [B1]	Legal Address: 1 Main Street
Date of Birth: 03/09/1956 [F5]	Address: N/A	Waltham, MA 02453
SSN: xx-xx-1234	Mailing Address: 1 Main Street	
Relationship: Non-Spouse	Waltham, MA 02453	
Status: V	Legal Address: 1 Main Street	
Address: None	Waltham, MA 02453	
Name: Sarah Smith	Home Phone: 781-555-1234	
Designation: PRIMARY	Occupation: RETIRED	
Percentage: 25		
Date of Birth: 10/18/1957 [F4]		
SSN: xx-xx-1234		
Relationship: Non-Spouse		
Status: V		
Address: None		
Name: Stephen Smith		
Designation: PRIMARY		
Percentage: 25		
Date of Birth: 04/29/1962 [F1]		
SSN: xx-xx-1234		
Relationship: Non-Spouse		
Status: V		
Address: None		
Name: Liz Smith		
Designation: PRIMARY		
Percentage: 25		
Date of Birth: 02/03/1966 [F7]		
SSN: xx-xx-1234		
Relationship: Non-Spouse		
Status: V		
Address: None		

### OTHER INFORMATION

Agency code: N/A
Product Level: N/A
Management Account: Y
Sweep Money: N/A
Market: ABCDF

### SUITABILITY

Annual Income:	100K+
Est. Net Worth:	500K+
Investable Liquid Assets:	500K - 1M
Federal Tax Bracket:	27.5% OR ABOVE
Annual Expenses:	
Special Expenses:	
Time Frame:	
Investment Purpose:	
Investment Objective:	Capital Appreciation -
Risk Tolerance:	Moderate
Investment Time Horizon:	Intermediate
Assets Held Away:	
Marital Status:	SINGLE
Number of Dependents:	0
Date of Birth:	01/06/1932 [B1]
General Investment Knowledge:	Good
Investment:	Stocks - Not Answered
Knowledge:	Bonds - Not Answered
	Short Term - Not Answered
	Mutual Funds - Not Answered
	Options - Not Answered
	Limited Partnerships - Not Answered
	Variable Contracts - Not Answered
	Futures - Not Answered
	Annuities - Not Answered
	Alternative Investments - Not Answered
	Margins - Not Answered
	Foreign Currency - Not Answered
	Foreign Securities - Not Answered

Investor360<sup>®</sup>  
Your Complete Financial Life

COMMONWEALTH financial network

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**Statements & Confirms** lets you download consolidated statements, brokerage statements, and trade confirms for your accounts with one click.

**Documents** allows you to view materials we've shared with you.

**Settings** lets you update your password, name, e-mail address, paperless preferences, and security information.

Month	March 31	June 30	September 30	December 31
Net Worth	\$57,868.62	\$70,022.57	\$82,026.83	\$92,068.10
Net Worth	\$97,184.13	\$95,297.00	\$90,205.02	\$100,568.56
Net Worth	\$113,124.63	\$118,972.57	\$102,083.77	\$199,163.50

**ENHANCED PRIVACY HELPS BRING PEACE OF MIND**

Investor360° uses security protocols in an effort to ensure that your account information stays between you and our firm. You update your own password; if you forget your login information, Investor360° will provide unique security questions to allow you, and only you, to regain access to your accounts. For added security, your complete social security number is not displayed within Investor360°.

**SIGN UP NOW TO SEE YOUR PORTFOLIO ONLINE**

Call us and we'll get you set up over the phone. You can start viewing your accounts today. That's all it takes to start seeing your complete financial picture from every angle, whenever and wherever it's convenient for you.