

**FINANCIAL SECURITY**  
**PLANNING SERVICES, INC.<sup>SM</sup>**



## Updates to Investor360<sup>®</sup> – Your Online Portal

May 2016



Through your Investor360<sup>®</sup> portal, viewing your account positions and cash balances, monthly and quarterly account statements, tax and other documents, plus so much more, is simple, easy and available to you anytime. You even receive an email notification that your account statements are available for viewing.

We want to notify you about recent changes that have occurred to your Investor360<sup>®</sup> login that will help provide additional security for your accounts.

The next time you log in to Investor360<sup>®</sup> you will be asked to assign a specific user to your ID. You can do this by selecting the designated user from the dropdown menu and clicking Save. Please keep in mind the following:

- You will be prompted to update your password and security questions.
- The designated user will still be able to view all accounts in the household he or she has permission to view but will only be permitted to make changes to accounts for which he or she is an authorized user.
- Designated users will receive a paper mailing notifying them of the change and confirming that they authorized it.

[These FAQs](#) will explain this change in more detail and provide additional information.

If you would like to establish or refresh your Investor360<sup>®</sup> portal, please contact us. We and the **environment** thank you!

My staff and I deeply appreciate the continuing opportunity to work with you. Please let me know if you have any questions or requests. Thank you.

Sincerely,

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