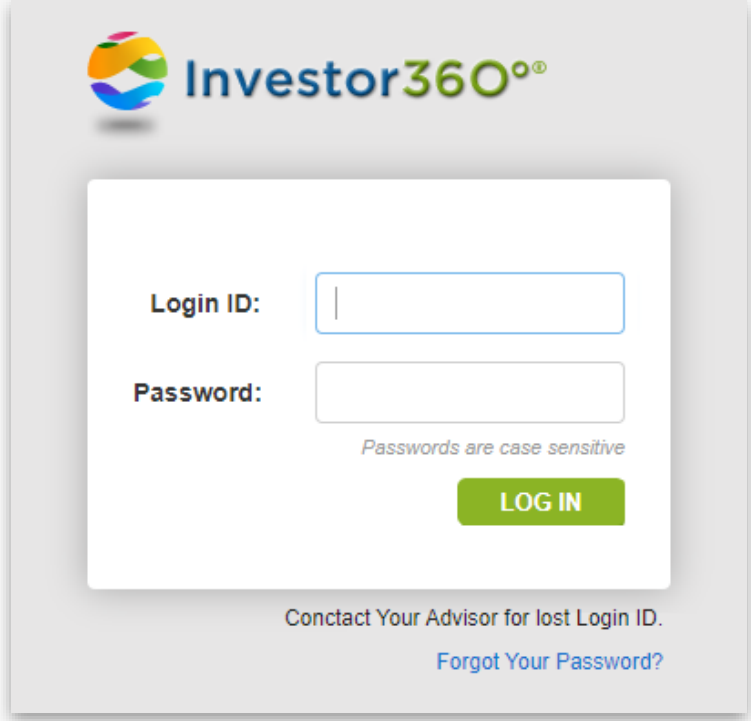


Setting up MFA

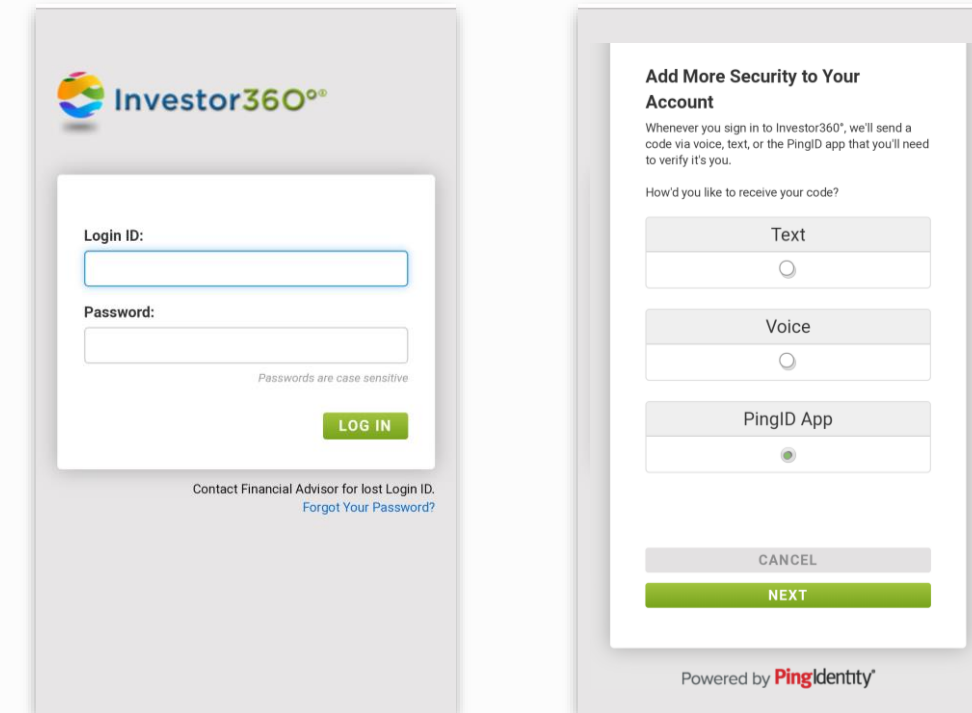
- 1 Log in to Investor360.com using your login ID and password.



The login screen features the Investor360 logo at the top. Below it is a white box containing two input fields: 'Login ID:' and 'Password:'. A green 'LOG IN' button is positioned below the password field. A note states 'Passwords are case sensitive'. At the bottom, there are links for 'Contact Your Advisor for lost Login ID.' and 'Forgot Your Password?'.

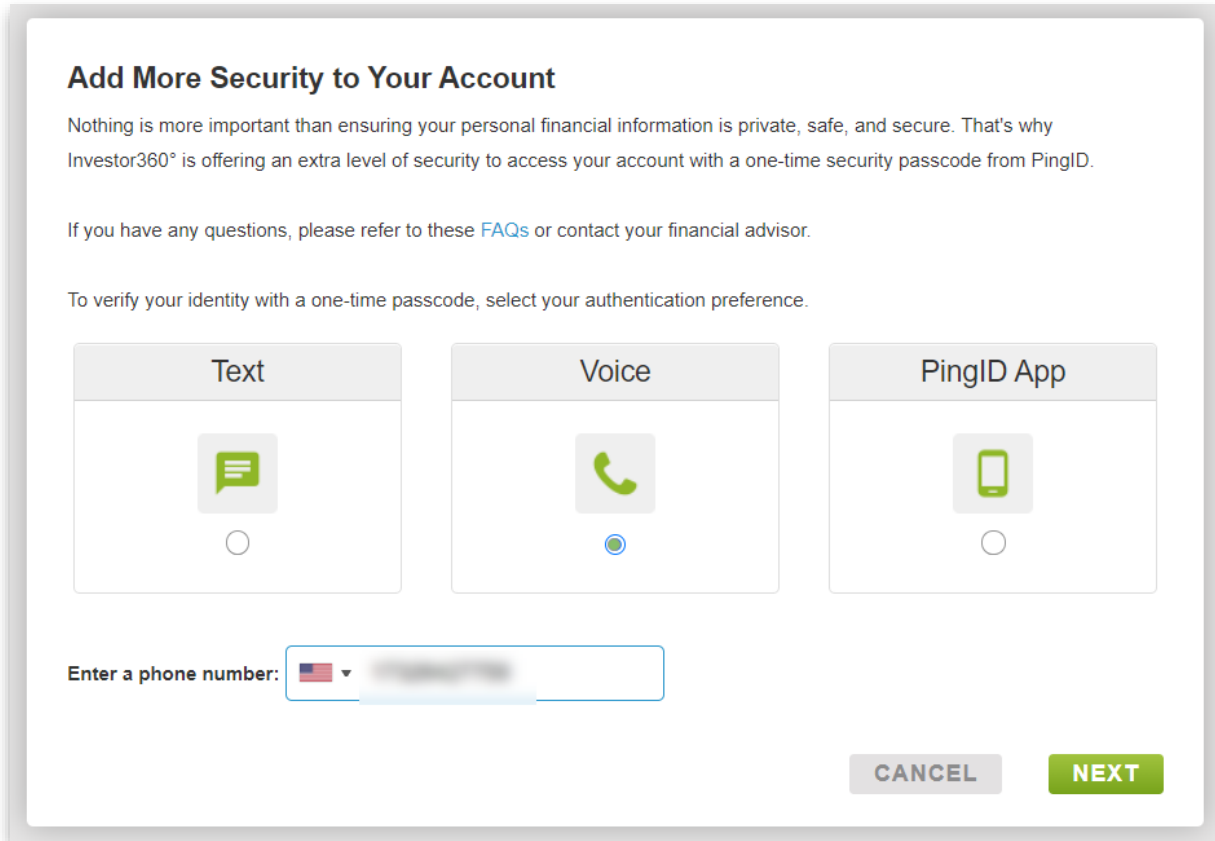
Using the Mobile App?

Visit the app store on your Android or iOS device to download the latest version of the Investor360° app.



The mobile app interface shows a login screen with 'Login ID:' and 'Password:' fields, a 'LOG IN' button, and links for 'Contact Financial Advisor for lost Login ID.' and 'Forgot Your Password?'. The second screen, titled 'Add More Security to Your Account', offers three options: 'Text', 'Voice', and 'PingID App', each with a radio button. A 'CANCEL' button and a green 'NEXT' button are at the bottom. The footer says 'Powered by PingIdentity'.

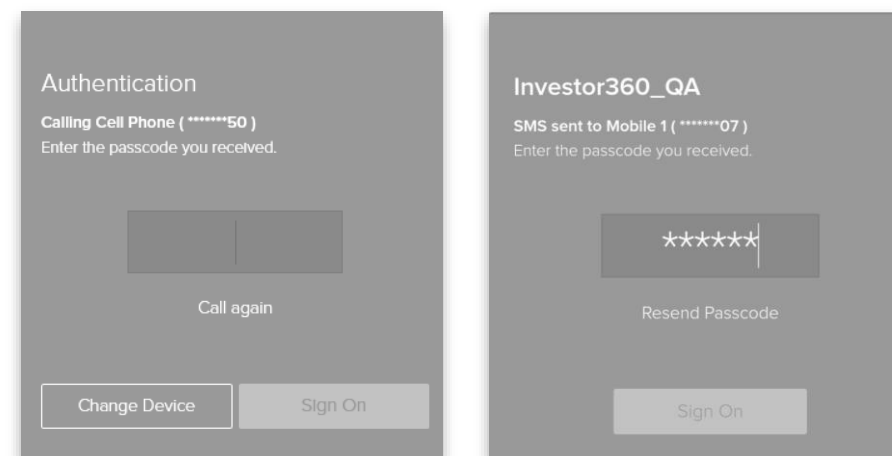
- 2 If you haven't already done so, you'll be asked to add a second factor to your account for security.



This screen is titled 'Add More Security to Your Account'. It explains that Investor360 is offering an extra level of security using PingID. It provides links to FAQs or a financial advisor. Below, it asks the user to select an authentication preference: 'Text' (with a message icon), 'Voice' (with a phone icon), or 'PingID App' (with a smartphone icon). Each option has a radio button. At the bottom, there is a field to 'Enter a phone number:' with a country code dropdown and a 'NEXT' button. 'CANCEL' and 'NEXT' buttons are also present at the bottom right.

For Text and Voice:

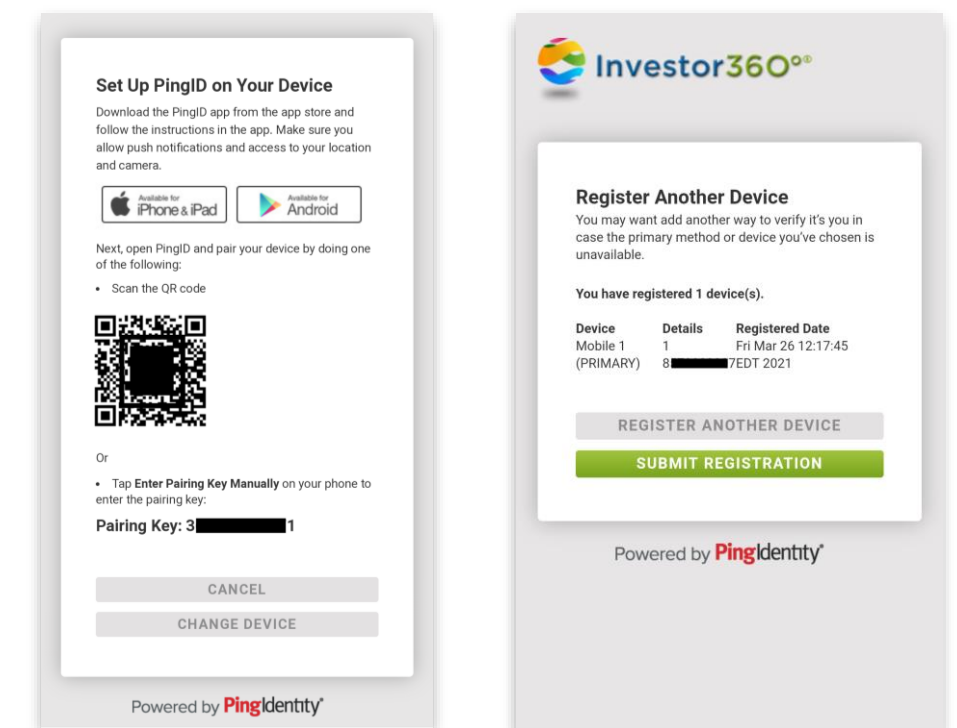
Enter your **phone number** in the box that appears, then enter the **six-digit registration code** sent to your phone via the option you selected.



The 'Authentication' screen shows 'Calling Cell Phone (*****50)' and asks to 'Enter the passcode you received.' with a six-digit input field and 'Call again' and 'Sign On' buttons. The 'Investor360_QA' screen shows 'SMS sent to Mobile 1 (*****07)' and asks to 'Enter the passcode you received.' with a six-digit input field and a 'Sign On' button.

For PingID

Follow the instructions to download the **PingID app** on your mobile device. Scan the **QR code** or enter the **Pairing Key** manually to finish registering your device.



The 'Set Up PingID on Your Device' screen provides instructions to download the app and scan a QR code. It also offers an option to 'Tap Enter Pairing Key Manually' with a 'Pairing Key' field. The 'Register Another Device' screen shows a table of registered devices and a 'SUBMIT REGISTRATION' button. Both screens are powered by PingIdentity.

Device	Details	Registered Date
Mobile 1 (PRIMARY)	1	Fri Mar 26 12:17:45 EDT 2021

Choose **Text**, **Voice**, or **PingID App**.
Enter a phone number if applicable, then select **Next**.

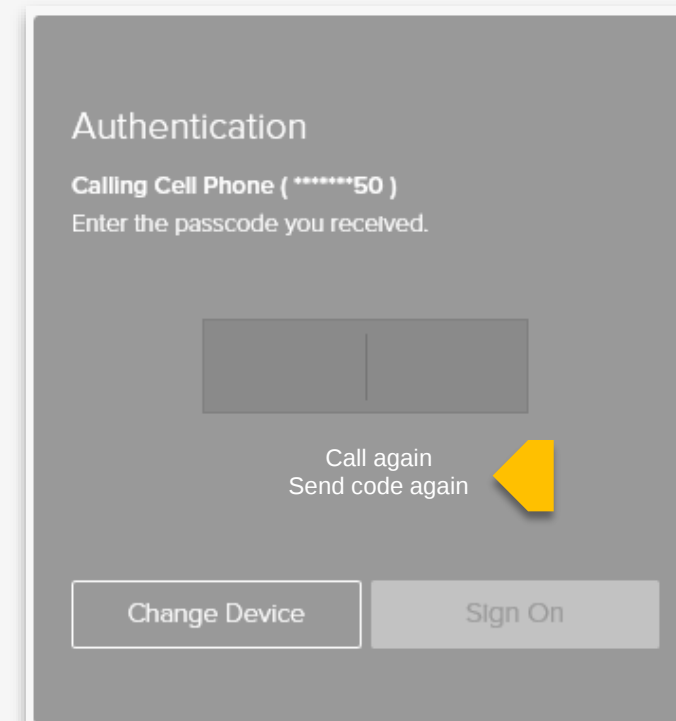
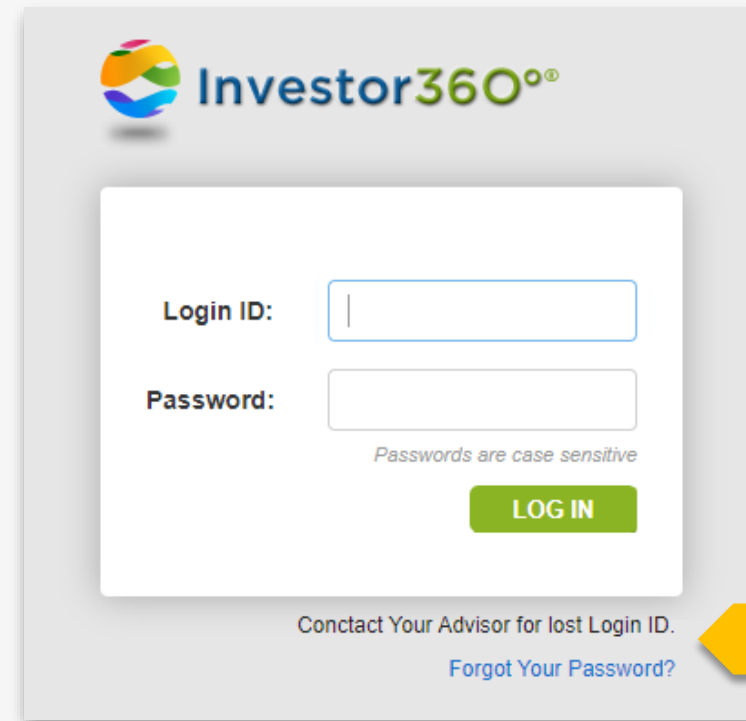
Troubleshooting Login Issues

Forgotten Password?

Select **Forgot Your Password?**
enter your login ID, and answer
two secret questions in order to
change your password.

Forgotten Login ID / Forgotten Secret Questions?

Contact your advisor.



Didn't Receive Passcode?

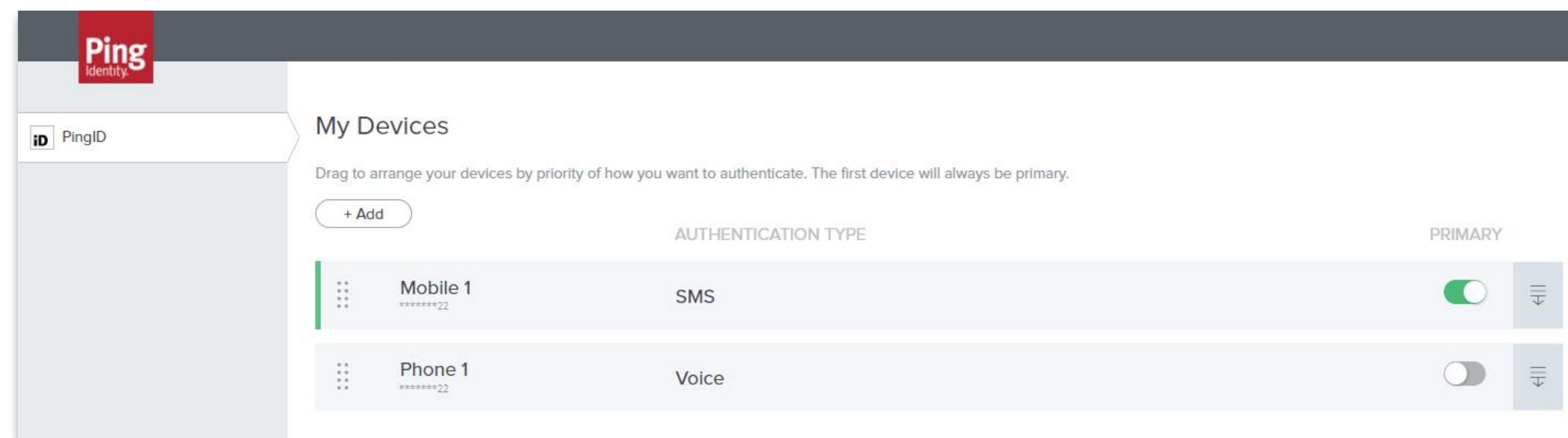
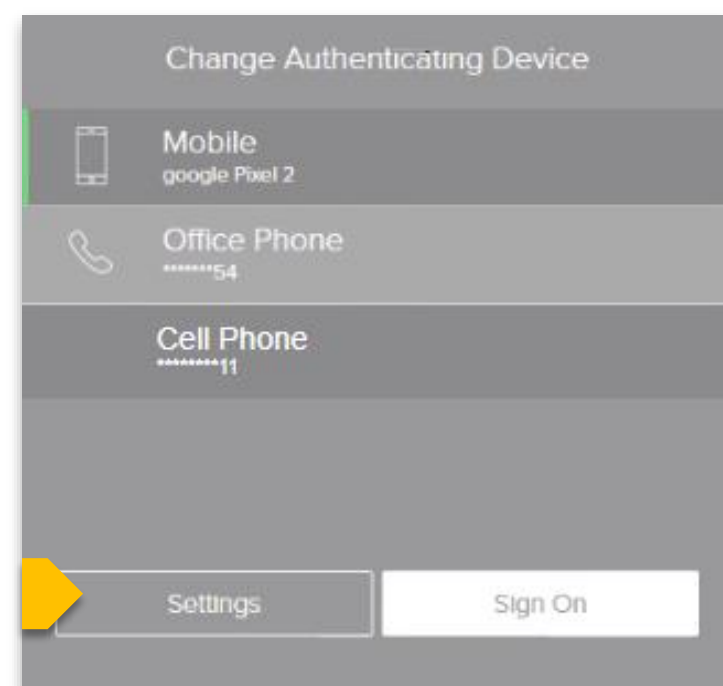
Voice: Select Call again

Text: Select Send code again

Managing Multiple Devices

Add, remove, and change the priority of
your registered devices by selecting
Settings on the **Change Authenticating
Device** screen.

Devices are listed on this screen in the
order they are used for authentication.



My Devices (Settings)

Add a new device: **+ Add**

Edit an existing device: **Expand** icon (at the right of the row)

Delete an existing device: **Expand** icon, then select the **trash can** icon

Set a primary device: Drag and drop a device to the top of the list