

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.

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

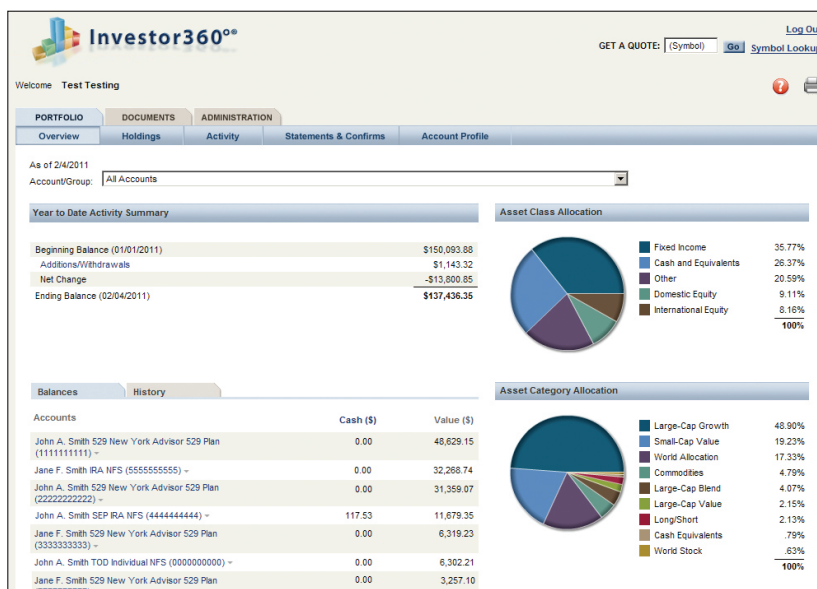
Investor360[®] lets you view much of the same information we do when managing your accounts. You can:

- **See your account balances** and a detailed position breakdown for each account.
- View balances and positions for all your accounts held with us in **one easy-to-read, consolidated report**.
- **Check on recent transactions** within your accounts.
- **Review important facts**, such as your account setup and contact information, listed beneficiaries, and other named individuals.
- **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.
- Import account information to TurboTax for easier, more efficient tax filing.

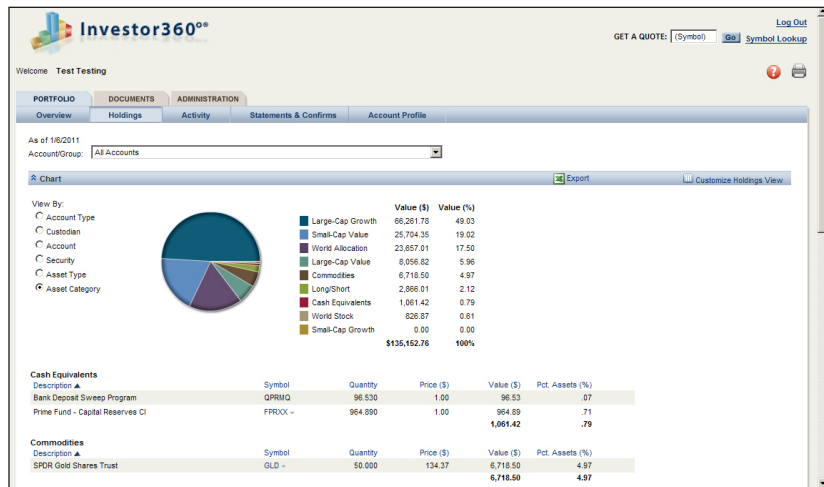
EASY TO USE, EASY TO UNDERSTAND

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 and benchmark information, and provides charts of your current net worth and historical values.



Holdings shows you all your holdings 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.



Activity details all your account activity, such as buys and sells, dividends, and adjustments. Smart filters make it easy to drill down into an activity to find what you are looking for.

The screenshot shows the 'Activity' page in Investor360, displaying a list of transactions with columns for Date, Account, Activity Type, Description, Quantity, Price (\$), and Amount (\$).

Date	Account	Activity Type	Description	Quantity	Price (\$)	Amount (\$)
12/31/10	0C8077895	Dividend Received	Fairholme Fund	0.000	0.00	6.20
12/31/10	D49040932	Dividend Received	Prime Fund - Capital Reserves CI	0.000	0.00	0.01
12/31/10	0C8098337	Reinvestment	Bank Deposit Sweep Program	0.010	1.00	-0.01
12/31/10	0C8077895	Reinvestment	Fairholme Fund	0.174	35.63	-6.20
12/31/10	D49040932	Reinvestment	Prime Fund - Capital Reserves CI	0.010	1.00	-0.01
12/31/10	0C8098337	Interest Income	Bank Deposit Sweep Program	0.000	0.00	0.01
12/30/10	0C8098337	Dividend Received	Rochester Fund Municipals Fund Cl A	0.000	0.00	26.98
12/30/10	0C8098337	Reinvestment	Rochester Fund Municipals Fund Cl A	1.760	15.33	-26.98
12/29/10	0C8098337	Buy	Bank Deposit Sweep Program	400.750	1.00	-400.75
12/29/10	D49040932	Dividend Received	Federated Market Opportunity Fund Cl A	0.000	0.00	224.88
12/29/10	0C8077895	Dividend Received	Ategris Managed Futures Strategy Fund Cl I	0.000	0.00	10.59
12/29/10	D49040932	Reinvestment	Federated Market Opportunity Fund Cl A	23.304	9.65	-224.88
12/29/10	0C8077895	Reinvestment	Ategris Managed Futures Strategy Fund Cl I	1.014	10.44	-10.59

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

The screenshot shows the 'Statements & Confirms' page in Investor360. It displays a list of statements and confirms, including consolidated statements, quarterly statements, and brokerage statements. It also includes a section for confirms with a date range and a table of confirm details.

Statement Inserts	Date Range
09/30/2009	09/30/2009

Please note: Brokerage statements are generally posted within 5 business days of month-end.

Confirms	Go to Page	of 1	Go	Rows per Page	Go	Show All Pages
Date Range: 2/9/2010 to 2/9/2011	1	1	Go	25	Go	Show All Pages

TRADE DATE	ACCOUNT #	REGISTRATION
05/13/2010	111-111111	JOHN A SMITH JANE F SMITH

Tax Documents	Year
John A. Smith SEP IRA NFS (4444444444)	2008 - 5490
John A. Smith & Jane F. Smith Join w/Survivor NFS (9999999999)	2008 - 1099
Jane F. Smith IRA NFS (5555555555)	2008 - 5490

Account Profile lists the addresses on file for your account, holding instructions, and any listed beneficiaries.

Investor360[®] GET A QUOTE: [Symbol] [Go] Symbol Lookup Log Out

Welcome Test Testing

PORTFOLIO DOCUMENTS ADMINISTRATION
 Overview Holdings Activity Statements & Confirms Account Profile

Account/Group: John A. Smith 529 New York Advisor 529 Plan (2222222222)

Account Summary

Account Number: 2222222222
 Account Reg: JOHN A SMITH OWNER MARK S SMITH BENEFICIARY 123 COMMONWEALTH ROAD WALTHAM MA 12345-6789
 Account Name: JOHN A. SMITH Contract Date: Initial Funding:
 Reg Type: 529 Open Date: 7/9/2004 Business Line: Direct Sponsor Business
 Sponsor: New York Advisor 529 Plan Close Date: PPS Account: No
 Rep Id: A123 (John Smith) Managed Account: Yes PPS Strategy:
 Status Code: Open Fee Authorization: PPS Objective:

Client Information **Sponsor Information**

BOOKS AND RECORDS

Names On This Account
 JOHN A. SMITH (Primary)
 SSN: xxx-xx-1234
 Birth Date: 01/01/1911 [100]
 Affiliated:
 Mailing Address: 123 COMMONWEALTH ROAD WALTHAM MA 12345
 Legal Address: 123 COMMONWEALTH ROAD WALTHAM MA 12345
 Home Phone: (123) 456-7890
 Work Phone: (123) 456-7890
 Occupation: FINANCIAL ADVISOR

Account Address Information
 Mailing Address: 123 COMMONWEALTH ROAD WALTHAM MA 12345
 Legal Address: 123 COMMONWEALTH ROAD WALTHAM MA 12345

CFN Paperwork
 CFN NAF Number: 1234
 Rep ID: A123
 Reg Type: 529
 NFS Account: n/a
 App Status: ON FILE
 Last RAP Date: 9/4/2009

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

Investor360[®] GET A QUOTE: [Symbol] [Go] Symbol Lookup Log Out

Welcome Test Testing

PORTFOLIO DOCUMENTS ADMINISTRATION
 Personal Information Preferences

Personal Information

Username: eTraining
 First Name: Test
 Last Name: Testing

Note: All questions are required.

Email: [test@commonwealth.com] Why do you need my e-mail address?
 Confirm Email: [test@commonwealth.com]
 I do not have an email address.
 Password: [*****] (At least 8 characters, including 1 number)
 Confirm Password: [*****]

Secret Questions
 Secret questions and answers will be used in the event that you forget your password.

Secret Question #1: City of birth
 Answer #1: Waltham
 Secret Question #2: Dream vacation spot
 Answer #2: Moon

*Required Field

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

The screenshot shows the Investor360 web application interface. At the top, there is a navigation bar with 'PORTFOLIO', 'DOCUMENTS', and 'ADMINISTRATION' tabs. The 'DOCUMENTS' tab is active. Below the tabs is a table with the following columns: Document, Date Shared, Client Name, and Account#. The table contains 20 rows of document entries, each with a document icon to the left of the document name.

Document	Date Shared	Client Name	Account#
CHECKBOOK RE-ORDER	02/08/2011	JOHN A SMITH	111111111
JOURNAL REQ. CASHIERING	02/08/2011	JOHN A SMITH	111111111
RETURNED CHECK	02/08/2011	JOHN A SMITH	111111111
PIP APP	02/08/2011	JOHN A SMITH	222222222
JOURNAL REQUEST	02/08/2011	JOHN A SMITH	111111111
DIRECT AF	02/08/2011	JOHN A SMITH	
CLIENT PROCESSING FORM	02/08/2011	JOHN A SMITH	
W9/W8	02/08/2011	JOHN A SMITH	
CHECKBOOK RE-ORDER	02/08/2011	JOHN A SMITH	111111111
LP SUBSCRIPTION AGRMINT	02/08/2011	JOHN A SMITH	
PROSPECTUS RECEIPT	02/08/2011	JOHN A SMITH	222222222
IRA AUTH FOR LIREIT	02/08/2011	JOHN A SMITH	222222222
PIP CONFIRM	02/08/2011	JOHN A SMITH	222222222
DIRECT AF: 529	02/08/2011	JOHN A SMITH	
HOUSEHOLD RELATIONSHIP FORM	02/08/2011	JOHN A SMITH	222222222
ONE TIME DIST REQ	02/08/2011	JOHN A SMITH	222222222
LOI DIRECT MAIL	02/08/2011	JOHN A SMITH	
IRA/RRL/ROTH/SEP-IRA APP	02/08/2011	JANE F SMITH	333333333
INCOMING TRANSFER FORM	02/08/2011	JANE F SMITH	333333333
HOUSEHOLD RELATIONSHIP FORM	02/08/2011	JANE F SMITH	333333333

COMPLETE PRIVACY BRINGS PEACE OF MIND

Investor360° uses the most advanced online security protocols in an effort to ensure your account information stays between you and our firm, so you can feel confident knowing your personal information is protected. 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.