

Nancy J. LaPointe

MBA, CFP®, ChFC®, CLU®, CASL®, RICP®
Financial Planner, Wealth Manager,
Investment Adviser Representative*



NAVIGATE FINANCIAL
Charting Your Journey

Subject: New Investor360° Experience Coming August 18; Legacy Investor360° Retiring

Dear client,

I'm pleased to share with you that a new Investor360° experience will soon be available to you, starting on Friday, August 18. You will have access to all of the same features you are used to as well as several critical enhancements. The legacy version of Investor360° is retiring once you transition to the new experience.

You can learn more about the new Investor360° by watching this video:

<https://www.navigatefinancialnw.com/account-access>.

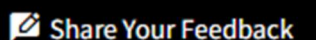
The video explains all Investor360° has to offer, including:

- **Dashboard:** A customizable dashboard—with widgets you can move, customize, and remove—as well as quick account group functionality
- **Intraday pricing:** Real-time pricing available for National Financial Services (NFS) accounts
- **Document upload:** The ability to upload your documents, removing the extra step of emailing them to your advisor
- **Market data and research:** Quick access to news, research, and other content directly related to your portfolio

What Do You Need to Do?

Beginning Friday, August 18, you will need to accept the new terms and conditions in the new Investor360° experience, if you haven't already.

As you use the new experience, please consider providing feedback through our in-app survey.

 Share Your Feedback |

What Should You Expect?

The new Investor360° experience will have an updated look and feel, with new features and functionalities. We encourage you to use the improved in-app help for guidance as you navigate the tool. In addition, new in-app help training videos (simply select the question mark button) are available in Investor360° via the Getting Started with Investor360° tile. These videos will guide you through the new experience:

- [Customizing the Dashboard](#)
- [Customizing Holdings View](#)
- [Exporting Account Activity](#)
- [Uploading Documents](#)
- [Markets and Research](#)

I have also attached a popular features guide for you to view.

Please note that the Investor360° mobile application will not be updated until later this year. If you choose to access investor360.com from a browser on a mobile device, however, you will be taken to the new

experience. I will communicate to you once I know more about the Investor360° mobile application update.

Questions?

If you have questions, please call my office at 360-628-8175.

Sincerely,



Nancy J. LaPointe



MBA, CFP®, ChFC®, CLU®, CASL®, RICP®
Financial Planner, Wealth Manager,
Investment Adviser Representative
NAVIGATE FINANCIAL
www.navigatefinancialNW.com
Nancy@navigatefinancialNW.com
Tel (360) 628-8175 Office Cell (360) 402-3200
3663 College St. SE, Suite B, Lacey, WA 98503

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