Coronavirus Update & Investor360° Online Access

April 17, 2020

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Coronavirus Update

Brad McMillan, Commonwealth's Chief Investment Officer, provides an update on the coronavirus crisis, including its effects on the economy and markets. With regard to the virus itself, we're seeing signs of progress. This week, the daily spread rate dipped below 5 percent, and the number of new cases per day started to stabilize. With this good news on the pandemic front, the focus is shifting to how to reopen the economy. Here, the news is not as good. With more than 22 million jobs lost over the past several weeks and many businesses remaining closed, the damage is mounting. Mitigating measures, like the stimulus checks, are starting to take effect, but a recession is likely. How bad will that recession be, and what could it mean for the markets? Watch this video to learn more.

I hope you find this video informative.

Investor360° for Online Access

Through your Investor360° client portal you always have online access to view your accounts and documents.

In addition Investor360° offers an account aggregation (daily data feeds) feature that allows you to view accounts that you hold at other institutions including investment, banking, loans, credit cards and insurance accounts.

By logging into your client portal, you can view your entire financial portfolio in one place.

Account aggregation offers several benefits, including:

- A holistic view of all your accounts held across various institutions, alongside the accounts you hold with me.
- Up-to-date access to account balances and holdings that refresh every night.
- Integration with tools and reports, saving you the hassle of gathering old statements to be entered manually.
- A function that allows you to manually enter assets yourself, eliminating the time it takes to provide supporting documentation for this process.
- The ability to submit new site requests for institutions that don't have an available connection.
- The ability to customize the settings of your linked accounts for a more intuitive, personalized experience.

Here are a couple quick Investor360°® videos to get you started:

Investor360 Step-by-Step

Account Aggregation Step-by-Step

Please note that your password information and access credentials continue to be managed solely by you. We cannot add, edit, use or view this information.

As always, we are here for you and your family.

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,

Paul S. Bonapart, JD, RFC, AIF®, President
Financial Security Planning Services, Inc.
520 Tamalpais Dr, Suites 103 & 104
Corte Madera, CA 94925
(415) 927-2555
www.FinancialSecurityPlanning.com
CA Insurance License No. 0808412

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