



THADDEUS M. O'BRIEN, MBA  
tobrien@soundviewfa.com

ROBERT J. BORONSKI, MBA, CFP®  
bboronski@soundviewfa.com

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“Do you know the password for my NCAA Basketball Tournament picks?” “What’s our iTunes password?” “Does anyone remember the wireless password?” User ID’s and passwords are driving me crazy! I counted 40 personal online sites from Amazon to Verizon for which I need to keep and remember a User ID and password. Add in the professional sites I use and it’s at least a 100. Wouldn’t it be great to have one place where you could see all your financial information – investment assets, bank accounts, mortgage and credit cards, estate planning documents, etc.?

Well, you can! We’re excited to share with you the new Investor360° designed to simplify your life by centralizing all your financial information into one easy-to-access place. With a single User ID and password you can get a complete picture of your current net worth including performance and tax data. The current activity and balances for your assets (investment, bank, 401k, etc.) and debits (mortgage, loans, and credit card) is all there on one, easy-to-read page.

The latest data encryption techniques are used to secure your information making it ideal for holding copies of your important estate documents such as Wills, Trusts and Power of Attorney. Should you lose these original documents through fire or theft you will have a copy of them safely stored away.

We are excited about the new Investor360° because it automatically provides you a timely, comprehensive picture of your financial condition and serves as a central repository for important documents that you or your family might need at any time.

To learn more, or begin using this terrific service, call the office or email Steffanie at [stopolski@soundviewfa.com](mailto:stopolski@soundviewfa.com).

Sincerely,

Robert J. Boronski, MBA, CFP®

762 Post Road • Darien, CT 06820  
Thad: (800) 656-0098

www.soundviewfa.com  
Fax: (866) 798-8050

P.O. Box 290 • Monroe, CT 06468  
Bob: (203) 261-3859