Account View

Getting Started User Guide

Introduction

This User Guide will walk you through how to create a profile in Account View. Here are a few things to keep in mind:

- The first time you access Account View and going forward, you can do so on your desktop computer, tablet, or mobile device (either iOS or Android).
- You will need to have your email open in order to retrieve a verification message that will be sent from noreply.myaccountviewonline@lpl.com. Adding noreply.myaccountviewonline@lpl.com to your contacts or address book will ensure receipt of the verification message.
- Have one of your LPL Financial account numbers on hand, as it will be required to validate your identity.

Look for these helpful Icons:

- Alert or Important

- Quick Tip

- Information or Note

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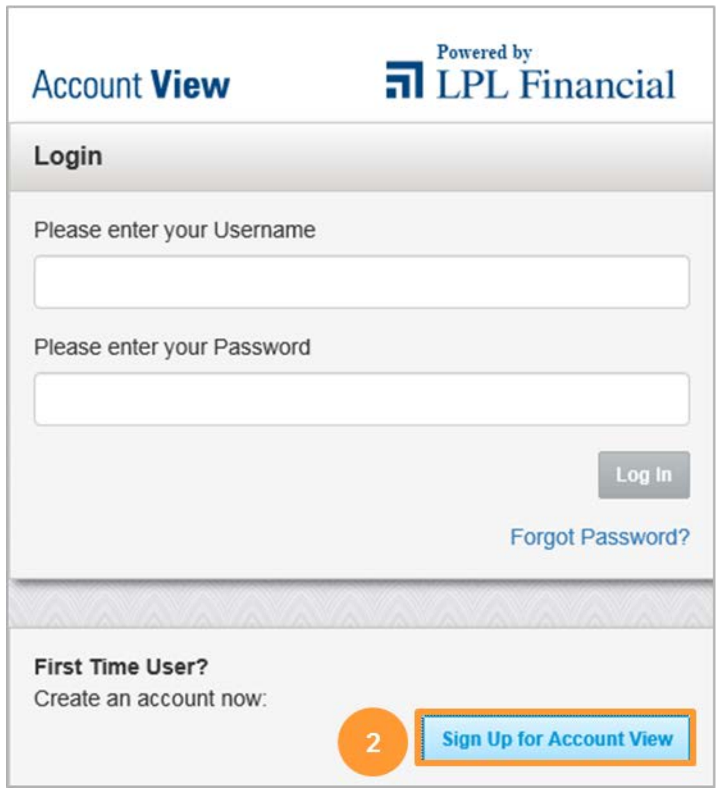
Access Account View

1. Access Account View through your Financial Advisor's website, or directly, at: www.myaccountviewonline.com.

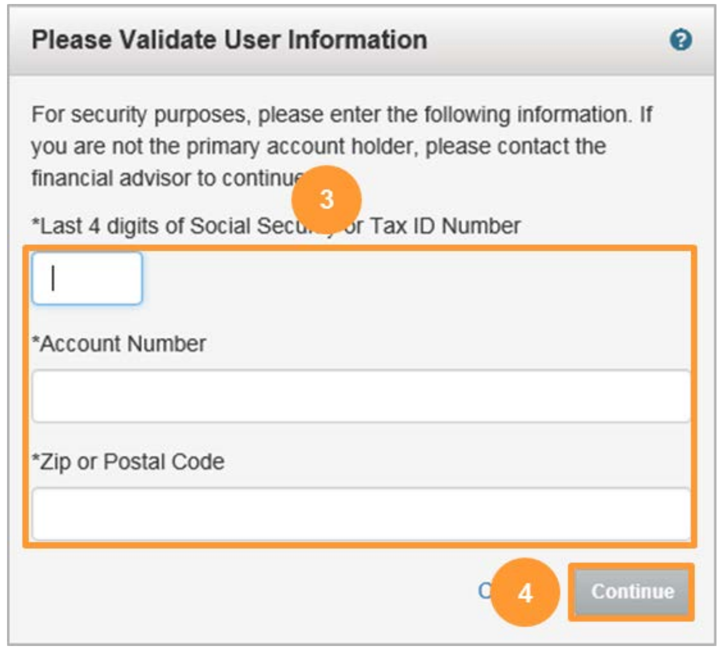
2. Create an account by clicking **Sign Up for Account View**.



3. Enter the last 4 digits of your **Social Security Number** or **Tax ID Number**, one of your LPL Financial **Account Numbers** and your **Zip or Postal Code**.

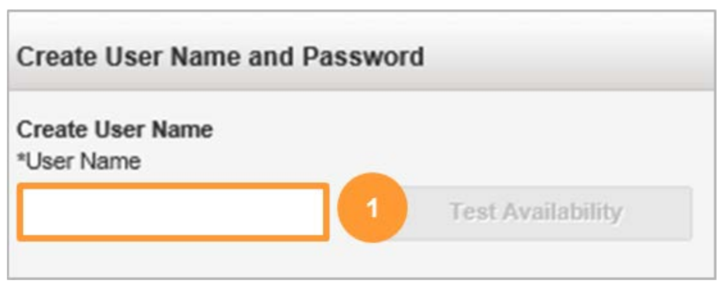
The zip code and SSN you enter have to match what is on the account.

4. Once you have entered your information, click **Continue**.

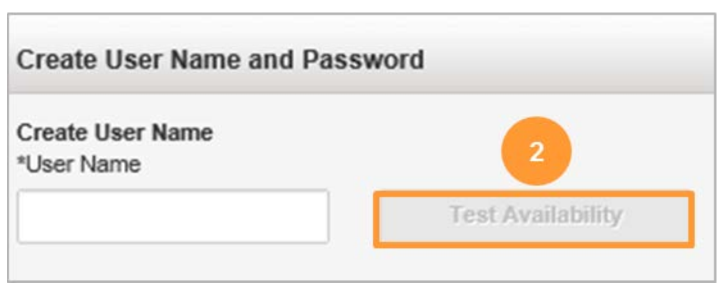


Create Your Profile

1. Create your **User Name**.



2. Click on **Test Availability** to check if your desired **User Name** is available. If not, select a new **User Name**.



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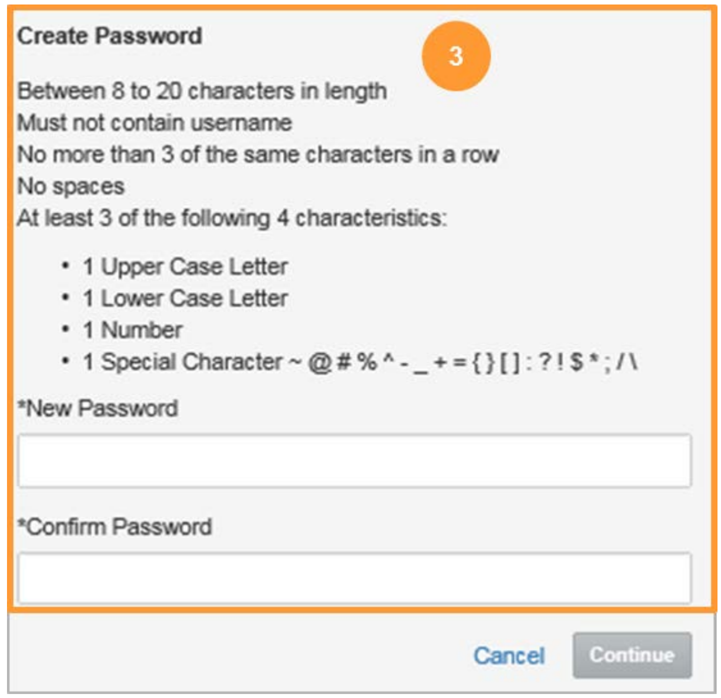
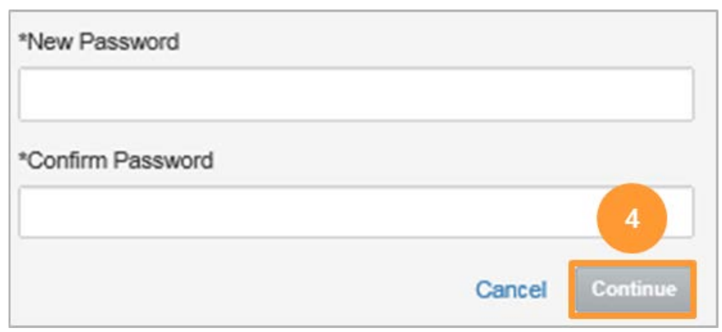
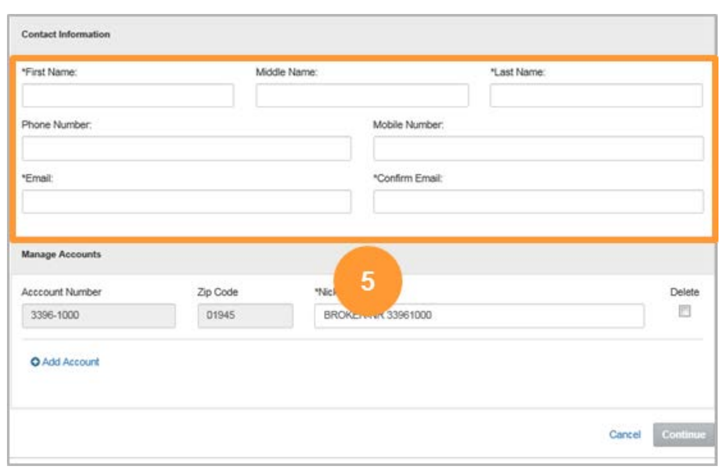
3. Select a **Password**. Take note of the Password requirements when choosing your password.



4. Click **Continue**.



5. Fill in your **Contact Information**.



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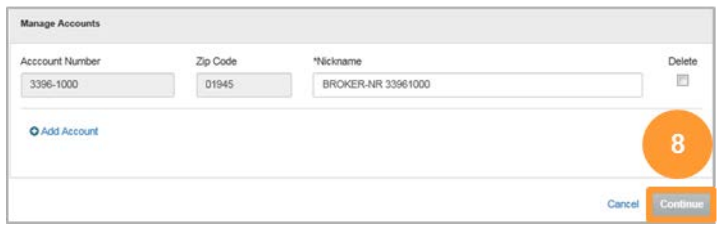
6. To add accounts to your profile, select **+Add Account.**

7. In the blank fields, enter an **Account Number** and a nickname for the account.

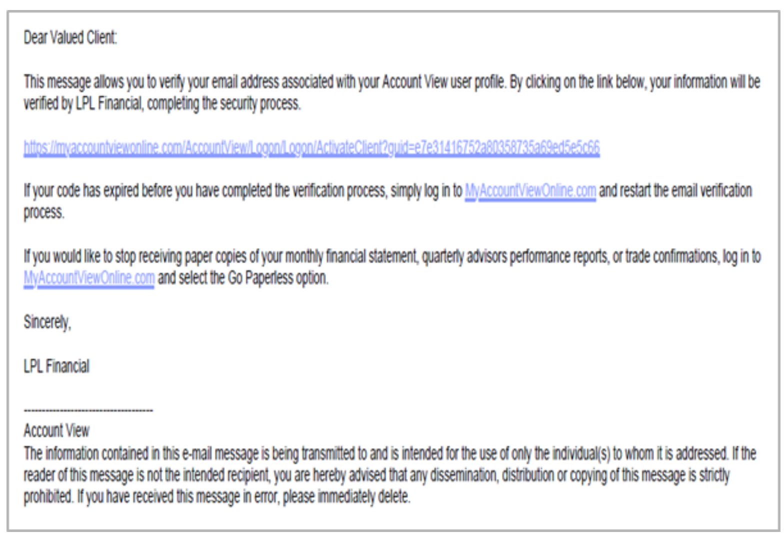
ⓘ If you are unable to add an account to your profile, please contact your Advisor.

8. Once you have added your account(s), click **Continue**.



Retrieve Email

1. Go to your email and open the message from: **noreply.myaccountviewonline@lpl.com**. Click on the **activation link** in the email to activate your profile.



Dear Valued Client:

This message allows you to verify your email address associated with your Account View user profile. By clicking on the link below, your information will be verified by LPL Financial, completing the security process.

https://myaccountviewonline.com/AccountView/Logon/Logon/ActivateClient?guid=e7e31416752a80358735a69ed5e5c66

If your code has expired before you have completed the verification process, simply log in to MyAccountViewOnline.com and restart the email verification process.

If you would like to stop receiving paper copies of your monthly financial statement, quarterly advisors performance reports, or trade confirmations, log in to MyAccountViewOnline.com and select the Go Paperless option.

Sincerely,

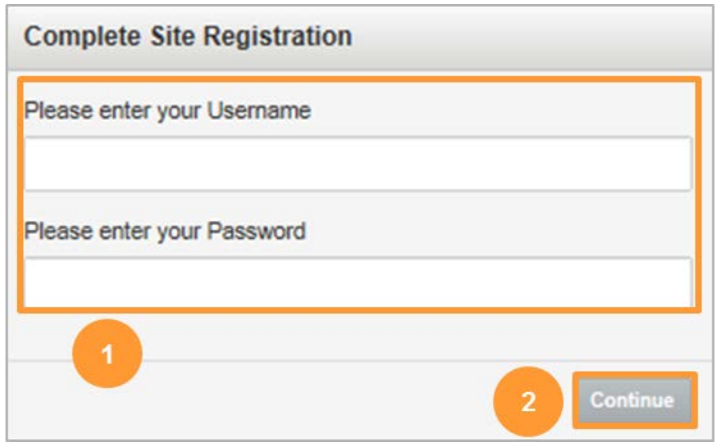
LPL Financial

Account View

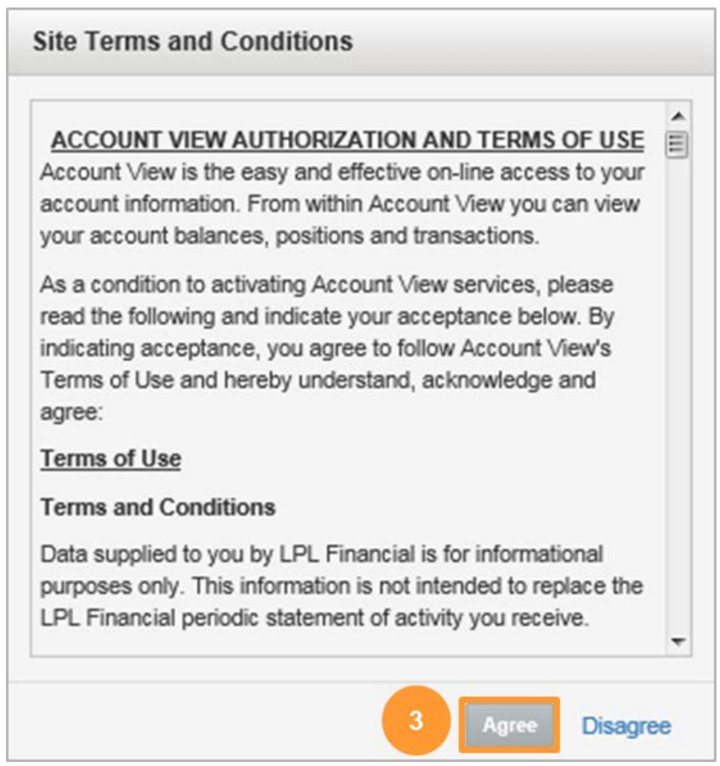
The information contained in this e-mail message is being transmitted to and is intended for the use of only the individual(s) to whom it is addressed. If the reader of this message is not the intended recipient, you are hereby advised that any dissemination, distribution or copying of this message is strictly prohibited. If you have received this message in error, please immediately delete.

Validate User Information

1. You will be presented with the Account View login screen. Enter your **Username** and **Password**.
2. Click **Continue**.



3. Agree to the site Terms and Conditions by selecting Agree.



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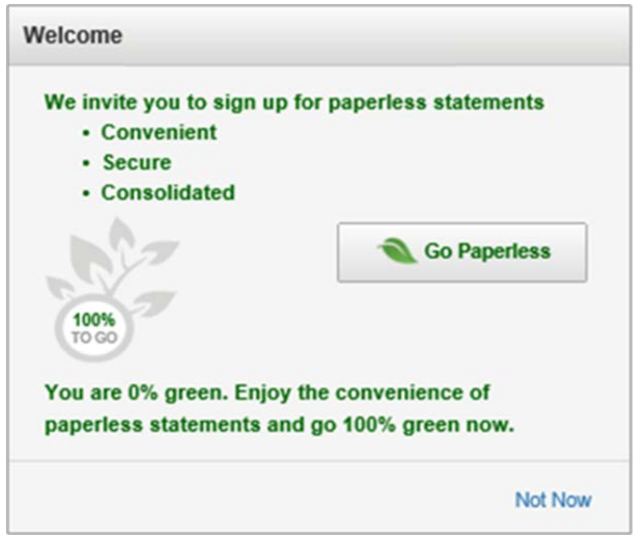
Go Paperless

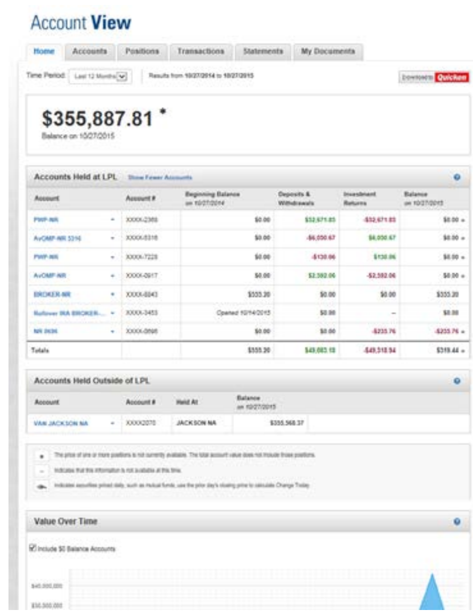
You can eliminate mailings and enjoy online access of your statements and trade confirmations by clicking **Go Paperless**.

The **Go Paperless** prompt will only display if you are registering on a desktop device.



Account View Homepage

You will be directed to your Account View homepage where you can begin viewing your account details, statements, and much more!



Please see the Account View brochure for instructions on customizing your settings and resetting your password.