

Account View | Going Paperless

OVERVIEW

This guide explains how to activate Go Paperless settings in Account View to begin receiving statements and other investment account documents electronically. Log in to Account View by visiting myaccountviewonline.com.

ICONS



Alert or Important



Quick Tip

ACCESSING PAPERLESS SETTINGS

1. While logged into Account View, click on **Documents and Statements**.

2. Click on **Paperless Settings**.



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Paperless Settings are also accessible by clicking on the **Settings** menu and choosing **Go Paperless** from the dropdown menu.

3. Select the individual document categories that you want to receive electronically, then click **Save**.



To choose all categories, click the **Go 100% Green** button.

You are 50% green. Click the "Go 100% Green" button to stop mail delivery of all your statements.

[Go 100% Green](#) Expand All Collapse All Reset

	Statement Type	Send Notices To	Additional Recipients
Use the checkboxes below to enable or disable paperless statements. Click on the icon below to edit recipients.			
<input checked="" type="checkbox"/>	Advisory Performance Reports You will be notified when new Advisory Performance Reports are available by email. Advisory Performance Reports can be found in Account View under the statements tab.		
<input checked="" type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	
<input checked="" type="checkbox"/>	Brokerage Statements You will be notified when new Brokerage Statements are available by email. Brokerage Statements can be found in Account View under the statements tab.		
<input checked="" type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	
<input type="checkbox"/>	Trade Confirmations You will be notified when new Trade Confirmations are available by email. Trade Confirmations can be found in Account View under the statements tab.		
<input type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	
<input type="checkbox"/>	Prospectus You will be notified when a new Prospectus is available by email. Prospectuses can be viewed by following the instructions in the email.		
<input type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	

Cancel Save



This account list will show both accounts that you own and any that you may only have an affiliation with (as a trustee, custodian, etc.) You will only be able to go paperless on accounts that you own. If you would like to activate paperless settings on accounts shown here that you may not own directly, email your advisor with your request for further assistance.

4. To change the email address for e-delivery or to add an additional recipient, first click on the button with three horizontal lines to the right of the particular document or account. A dialog box will open.

You are 50% green. Click the "Go 100% Green" button to stop mail delivery of all your statements.

[Go 100% Green](#) Expand All Collapse All Reset

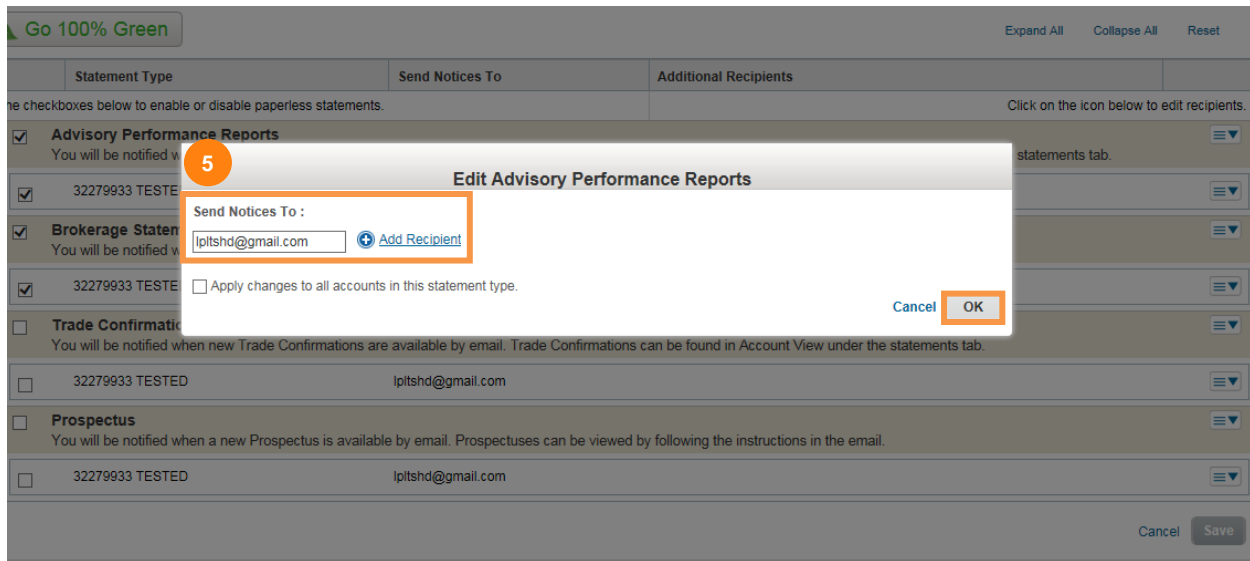
	Statement Type	Send Notices To	Additional Recipients
Use the checkboxes below to enable or disable paperless statements. Click on the icon below to edit recipients.			
<input checked="" type="checkbox"/>	Advisory Performance Reports You will be notified when new Advisory Performance Reports are available by email. Advisory Performance Reports can be found in Account View under the statements tab.		
<input checked="" type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	
<input checked="" type="checkbox"/>	Brokerage Statements You will be notified when new Brokerage Statements are available by email. Brokerage Statements can be found in Account View under the statements tab.		
<input checked="" type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	
<input type="checkbox"/>	Trade Confirmations You will be notified when new Trade Confirmations are available by email. Trade Confirmations can be found in Account View under the statements tab.		
<input type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	
<input type="checkbox"/>	Prospectus You will be notified when a new Prospectus is available by email. Prospectuses can be viewed by following the instructions in the email.		
<input type="checkbox"/>	32279933 TESTED	lpitshd@gmail.com	

Cancel Save



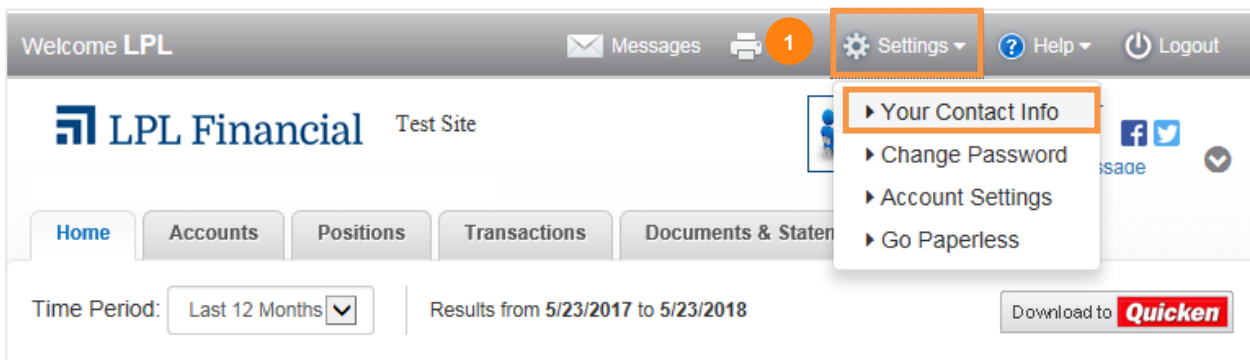
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5. Enter an email address in the box or click **Add Recipient** as needed. Click **OK** to save changes.

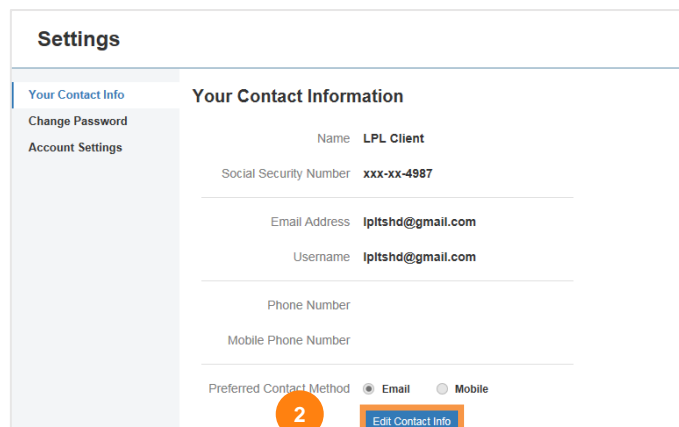


UPDATING ACCOUNT INFORMATION

1. To change contact information in Account View, click on **Settings**, and choose **Your Contact Info** from the dropdown menu.



2. Select **Edit Contact Info** at the bottom of the screen.



Account View | Going Paperless

3. Enter new information and click **Save Changes**.

lplshd@gmail.com Test Availability

Phone Number
(XXX) XXX-XXXX

(Optional)

Mobile Phone Number
(XXX) XXX-XXXX

(Optional)

Preferred Contact Method
 Email Mobile

3 Save Changes Cancel

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