

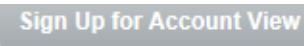
Account View

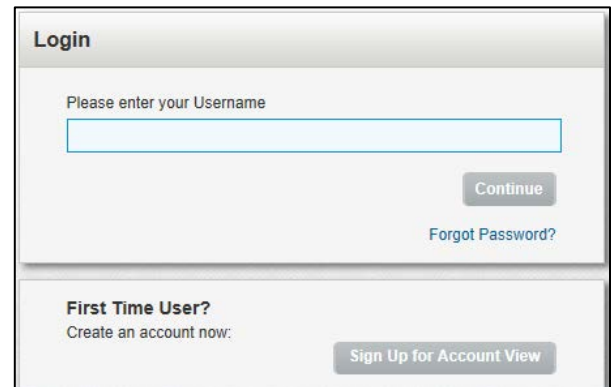
Getting Started

Before getting started:


- The first time you access Account View you will need to use your desktop computer. Going forward you can access Account View from your mobile device(s).
- You should have your email open 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
- An LPL account number will be required to validate your identity
- We recommend that you create one profile *per person* in your household, to ensure that paperless options can be selected on all accounts. To add all of your household's accounts (for viewing purposes) to each individual profile, please contact our office.

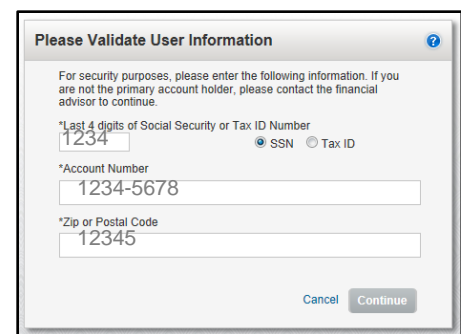
Step 1: Access Account View through your Financial Advisor's website, or directly, at: www.myaccountviewonline.com

Step 2: Create an account by selecting 



The screenshot shows a 'Login' window with a text input field for 'Please enter your Username'. Below the field is a 'Continue' button and a 'Forgot Password?' link. At the bottom, there is a 'First Time User?' section with the text 'Create an account now:' and a 'Sign Up for Account View' button.

Step 3: Enter the last 4 digits of your social security number or tax ID number, any one of your LPL account numbers with dashes (for example XXXX-XXXX), and zip code. Select  .



The screenshot shows a 'Please Validate User Information' window. It contains a warning message: 'For security purposes, please enter the following information. If you are not the primary account holder, please contact the financial advisor to continue.' Below this are three input fields: '*Last 4 digits of Social Security or Tax ID Number' (with '1234' entered), '*Account Number' (with '1234-5678' entered), and '*Zip or Postal Code' (with '12345' entered). There are radio buttons for 'SSN' (selected) and 'Tax ID'. At the bottom right are 'Cancel' and 'Continue' buttons.

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Step 4: Create your profile by adding the required information, choose a password, and select a security image.

Review your listed account(s). To add an additional account select **+ Add Account**, enter the Account Number and Nickname to refer to the account.

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

When you are ready to proceed, select



Create Profile

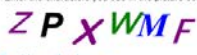
Account holder: Please complete the following information about yourself. (Third-parties are only authorized account access with explicit permission from the account holder and access granted by the account holder's advisor.)

Contact Information

*First Name: Middle Name: *Last Name:

* Social Security or Tax ID Number: Phone Number: Mobile Number:

*Email: *Confirm Email:

*Enter the characters you see in the picture below:

 Provide another Image:

* User Name: Use Email as User Name

* Preferred Contact Method
 Email Mobile

Note: Accessing Account View from an unrecognized device may require additional verification. If that occurs, an identification code will be sent to you via your preferred contact method. If an identification code is sent to you via text message, standard text messaging rates will be applied.

Manage Accounts

Account Number	Postal / Zip Code	* Nickname	Delete
1234-5678	10234	Roth IRA BROKER-RET 38791189	<input type="button" value="X"/>

Step 5: Verify the information you have entered in your profile and select **Create Profile**

Step 6: Confirmation will appear, letting you know that your profile has been created.

Select **OK** and close your browser window.

Verify Information

Contact Information

First Name: John Middle Name: Last Name: Smith


SSN / Tax ID: Phone Number: Mobile Number:

Email:

User Name: multipleacc012

Preferred Contact Method: Email

Security Information



Your Profile Has Been Created

Profile is created

First Name: John Middle Name: Last Name: Smith

SSN / Tax ID: Phone Number: Mobile Number:

Email:

Username: multipleacc012

Preferred Contact: Email

Accounts

Account #	Zip/Postal Code	Nickname
	20108	abc def
	20108	SWMM-RET
	20108	SWA-RET
	20108	abc def

For security purposes, we must verify your email address. An email has been sent to your email address on file with instructions on how to complete the email verification process.

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Step 7: Go to your email and open the message from: **noreply.myaccountviewonline@lpl.com**

Select the first link within the email.



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://qa.myaccountviewonline.com/AccountView/Logon/Logon/ActivateClient?guid=27b9a1a67fd8db3fc7c4d8a3f661d5e2>


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

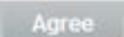
Step 8: You will be presented with the Account View login screen.

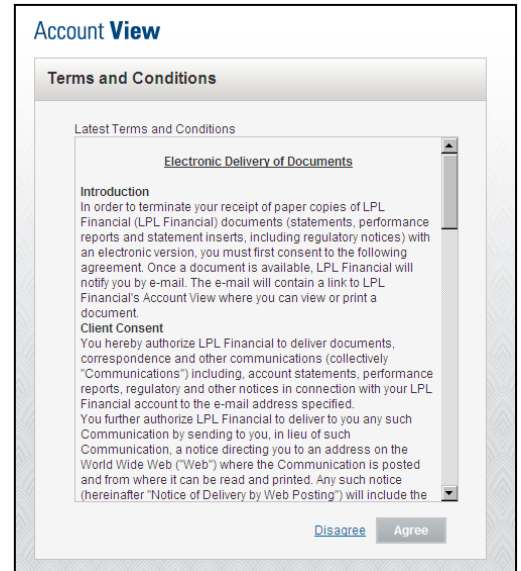
Enter your Username and select 


Step 9: Enter the last 4 digits of your social security number or tax ID number, any one of your LPL account numbers with dashes (for example XXXX-XXXX), and zip code. Select .

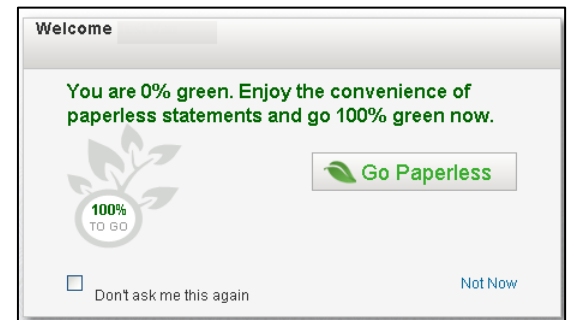
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Step 10: Agree to the site Terms and Conditions by selecting 



Step 11: You can eliminate mailings and enjoy online access of your statements and trade confirmations by selecting 



Step 12: Watch the **Demo Tour** video to learn more about the many benefits and features of Account View.

Select  to continue on to Account View.

Step 13: You will be directed to your Account View homepage where you can begin viewing your account details, statements, market news, and much more!

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

