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:

- You can access Account View via your 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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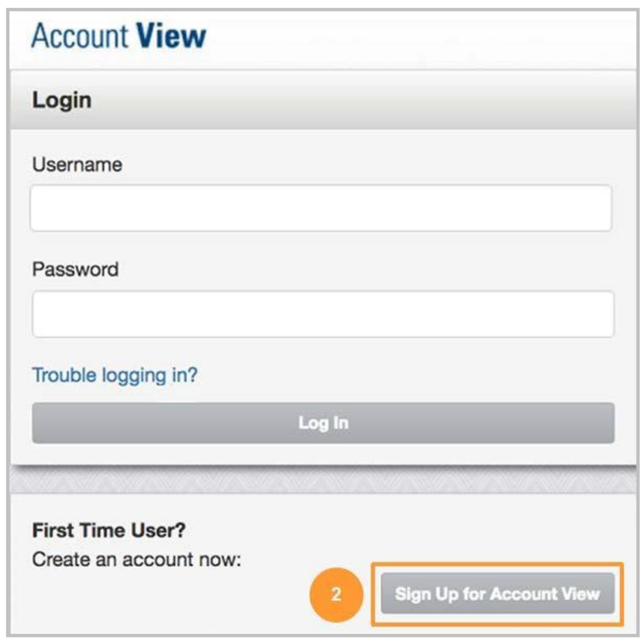
Access Account View

There are two ways a client can be setup in Account View.

- One is to allow the clients to create a profile themselves.
- Second would be if the Financial Advisor goes into Account View through ClientWorks and creates a profile for the client. The process will generate an email for the client to activate the profile.

Client Creates Profile

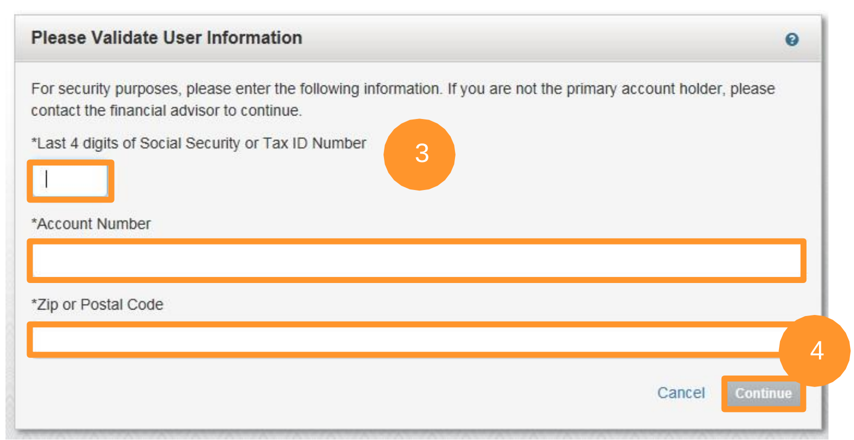
1. Access Account View through your financial advisor's website, or directly, at: www.myaccountviewonline.com.
2. Create an account by clicking **Sign Up for Account View**.



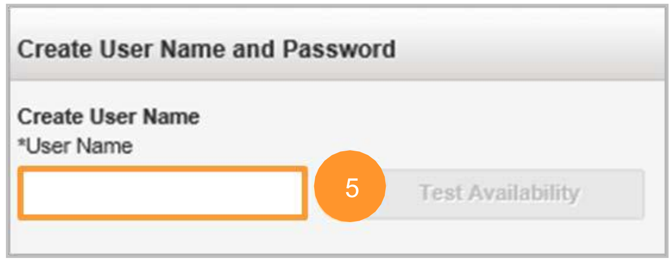
3. Enter the last 4 digits of your **Social Security Number** (SSN) or **Tax ID number**, **Account Number** and your **Zip** or **Postal Code.**

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

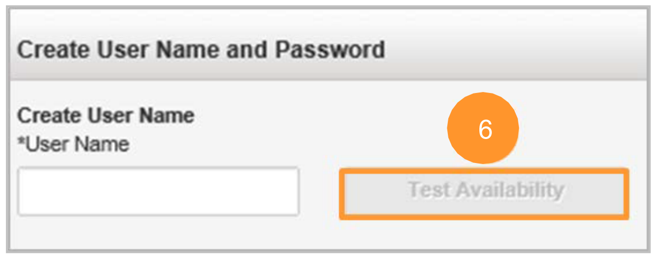
4. Once you have entered your information, click **Continue**.



5. Create your **User Name**.



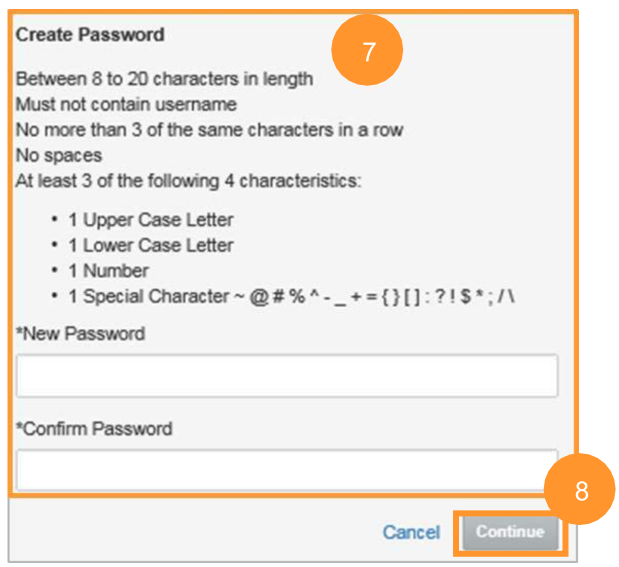
6. Click **Test Availability** to check if your desired **user name** is available. If not, select a new **User Name**.



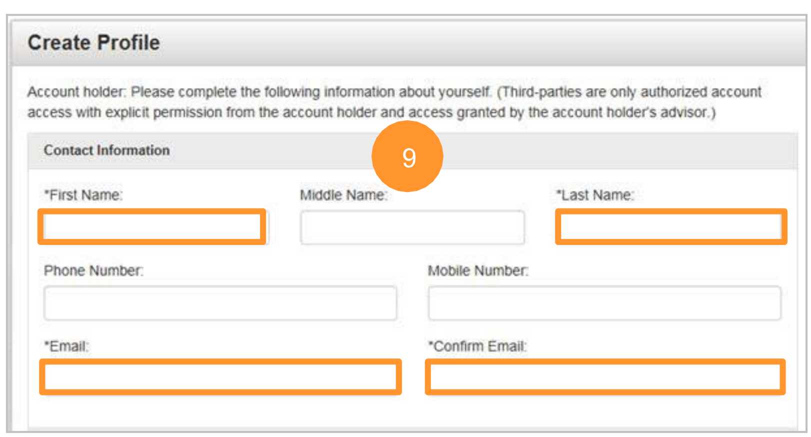
7. Select a **Password**.

- Take note of the password requirements when choosing your password.

8. Click **Continue.**



9. Enter your **Contact Information**.



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10. Enter **Account Number** and a **Nickname** for the account.

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

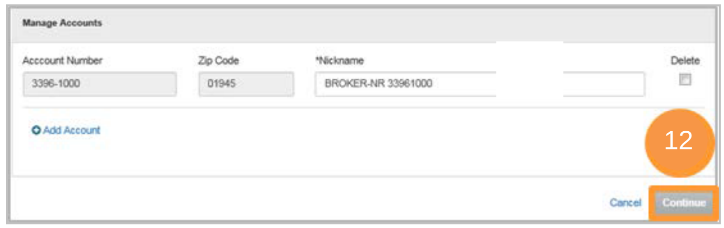
Clients can only add accounts where their SSN is the primary (i.e. a husband cannot add his wife's accounts or trust accounts since they have different SSNs\tax ids than the Account View profile. The Financial Advisor would have to add these.)

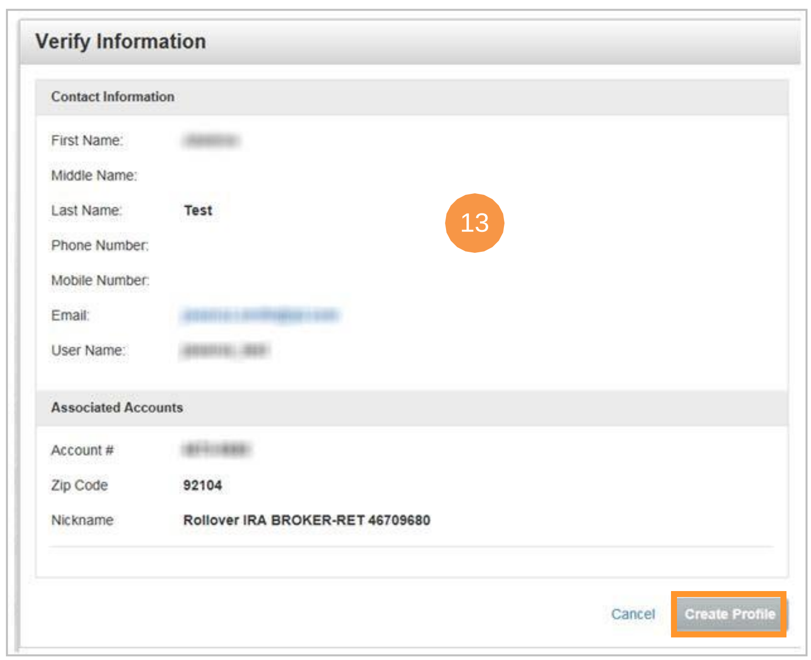
12. Click **Continue**.

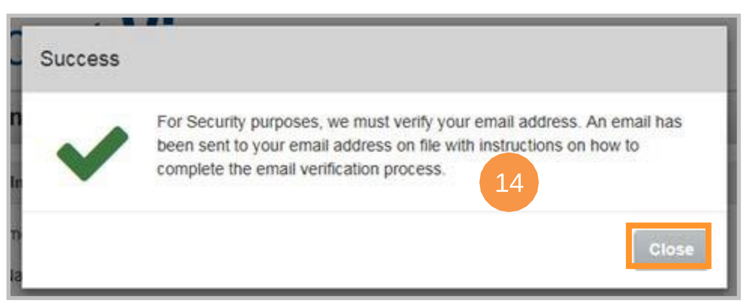
If you are unable to add an account to your profile, please contact your advisor.

13. Verify the information is correct and click **Create Profile**.

14. Click **Close** on the **Success** window**.**







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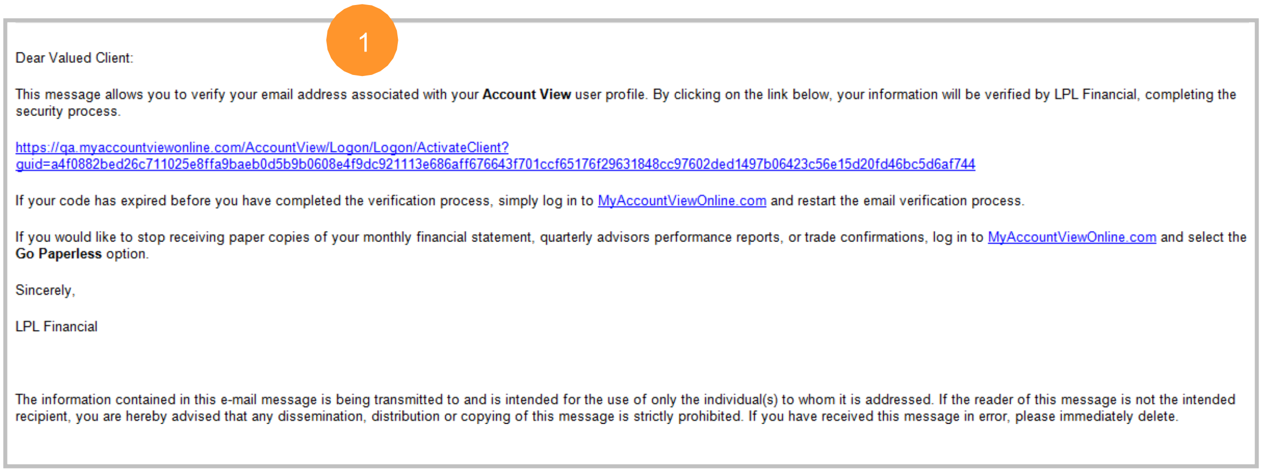
Retrieve Email

Once you have completed your profile you will receive an email in order to verify the Account View profile and email address.

Follow the steps provided in the email to verify your Account View profile and email address.

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


1

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=a4f0882bed26c711025e8ffa9baeb0d5b9b0608e4f9dc921113e686aff676643f701ccf65176f29631848cc97602ded1497b06423c56e15d20fd46bc5d6af744

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

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.

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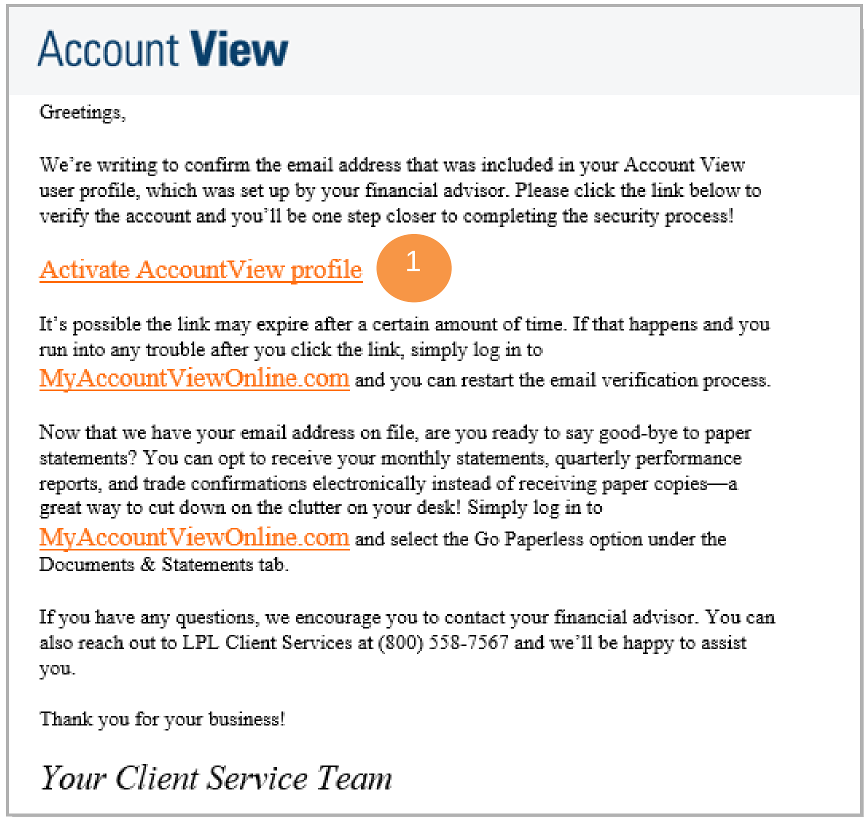
Financial Advisor Creates Client Profile

An alternative way that an Account View profile can be activated is if the Financial Advisor accesses Account View through ClientWorks, and creates a profile for the client. Once they create the profile, the system will generate an email for the client to activate their profile.

1. Click the **Activate AccountView Profile** link in the email to start the activation process.



Account View

Greetings,

We're writing to confirm the email address that was included in your Account View user profile, which was set up by your financial advisor. Please click the link below to verify the account and you'll be one step closer to completing the security process!

Activate AccountView profile 1

It's possible the link may expire after a certain amount of time. If that happens and you run into any trouble after you click the link, simply log in to MyAccountViewOnline.com and you can restart the email verification process.

Now that we have your email address on file, are you ready to say good-bye to paper statements? You can opt to receive your monthly statements, quarterly performance reports, and trade confirmations electronically instead of receiving paper copies—a great way to cut down on the clutter on your desk! Simply log in to MyAccountViewOnline.com and select the Go Paperless option under the Documents & Statements tab.

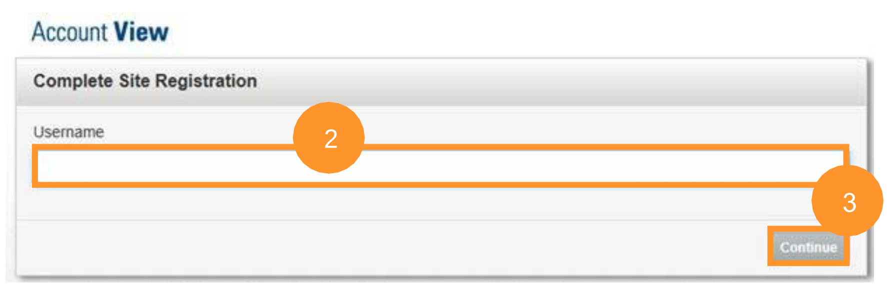
If you have any questions, we encourage you to contact your financial advisor. You can also reach out to LPL Client Services at (800) 558-7567 and we'll be happy to assist you.

Thank you for your business!

Your Client Service Team

2. Enter your **Username** on the **Complete Site Registration** screen.

3. Click **Continue**.



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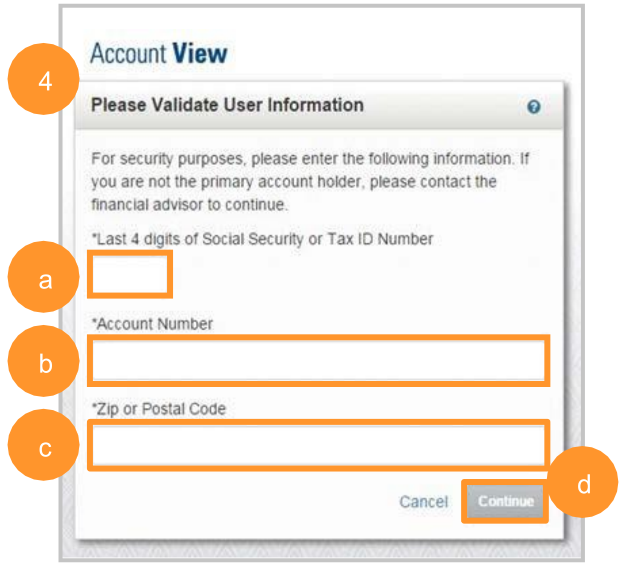
4. Complete the information needed on the **Validate User Information** screen.

   a) Enter the **last 4 digits of your Social Security or Tax ID number.**

   b) Enter one of your **LPL Financial Account Numbers.**

   c) Enter your **Zip** or **Postal Code.**

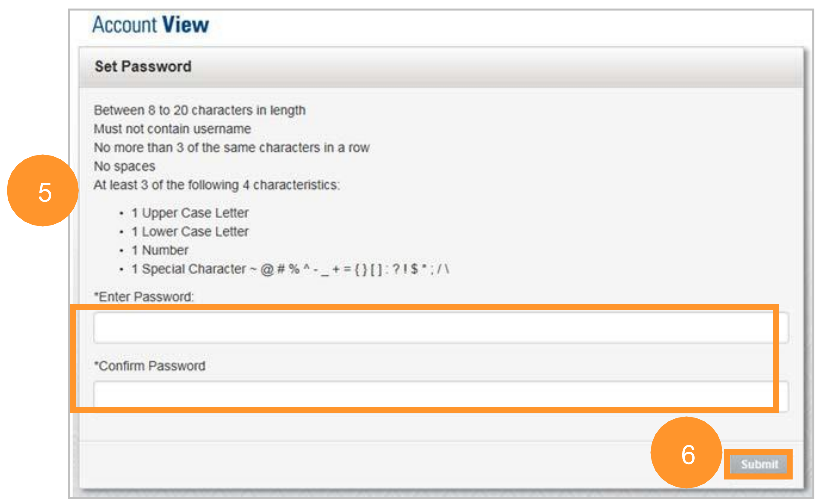
   d) Click **Continue.**



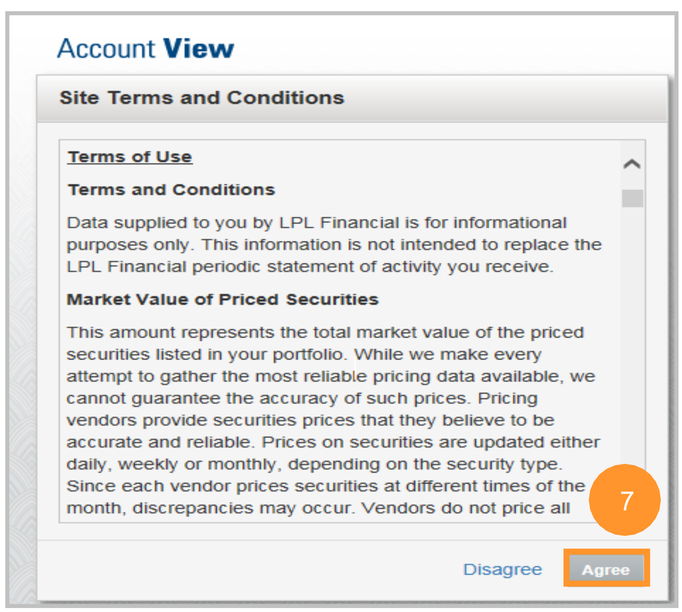
5. Select a **Password**

Follow the requirements when setting your password.

6. Click **Submit**



7. **Review and agree** to the **Site Terms and Conditions** by selecting **Agree.**

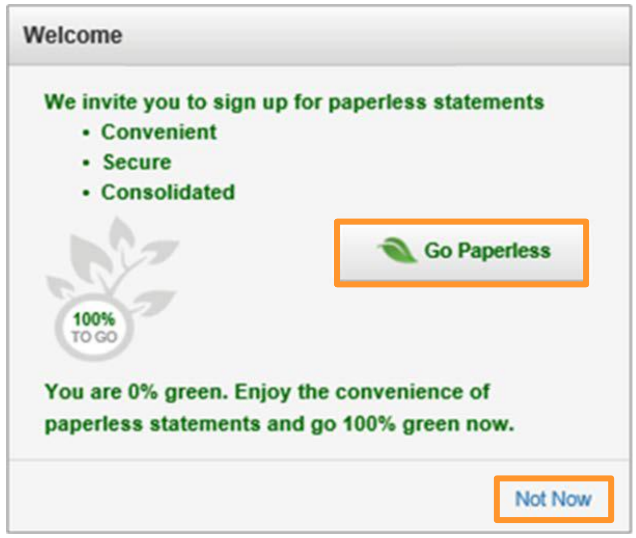


Go Paperless

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

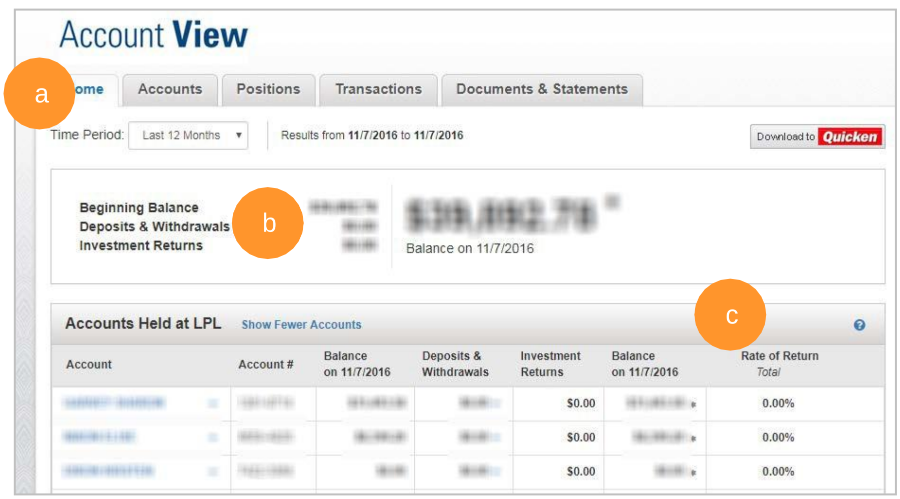
The **Go Paperless** prompt only displays if you are registering on a desktop device.

You can opt to **Go Paperless** or skip it by clicking **Not Now**.



Account View Homepage

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



a) Select the **time period** you want and it will apply across your summaries and value over time chart.

b) You can see the **beginning and ending balance**, as well as **deposits and withdrawals**, for the selected time period.

c) See how your **investments have performed** over time, including reinvested dividends, based on dollars you've invested.

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