**Instructions on logging onto Account View.**

**If you already use Account View go to the website** **homepage**. On the navigation bar under the banner “Alders Financial Solutions” where it says HOME –ABOUT-ACCOUNT VIEW etc. Click on “ACCOUNT VIEW” not “Getting Started In Account View”. This will bring you to the Account View log on page. If you have your user name and password enter it in the appropriate boxes and click continue. You can skip the paperless page and the Demo page although I strongly suggest to take the Demo at a later time.

If a first time user click on the “Sign Up For Account View” in the “First Time User” box. This will take you to a new screen. Here you will fill out the three sections, Last 4 digits of your Social Security number, your LPL account number (if you don’t know this please call the office 415-892-7766 and we will provide the number for you). And the last box enter your zip code. Click continue.

You are now in another screen called your Create Profile screen. Please fill out all the sections, name, address, phone number. Make sure you enter the email address you usually use. Confirm it. Then create a User Name, Click “Test Availability”. If you desire so you can click on “Use Email as User Name” and your username will be your email address.

Don’t forget to write you user name and password down as well as the account number to be used for verification.

Now click Continue. This will bring you to a refreshed profile page-which looks like the same page. Go down to the bottom right of this page and click on “Update Profile”. A message screen will come up informing you that an email is sent to your email of record. You will need to go there to activate your Account View.

Go to your email. Look for an email that says “No Reply” from Myaccountviewonline.com. Open the email, follow instructions by clicking on the long blue link. This will take you to the previous screen to enter your **last four digits of your Social Security number, account number, and your zip code**. Click Continue and this should take you to a screen about receiving paperless statements-you can skip this. Next screen is a Demo page-you can skip this also. The next page you are into your Account View.

Note: If you can’t find the “No Reply” email in your In Box go the Spam or Trash box. It may be there.

If you need more assistance please call the office 415-892-7766 and ask for Frank.