

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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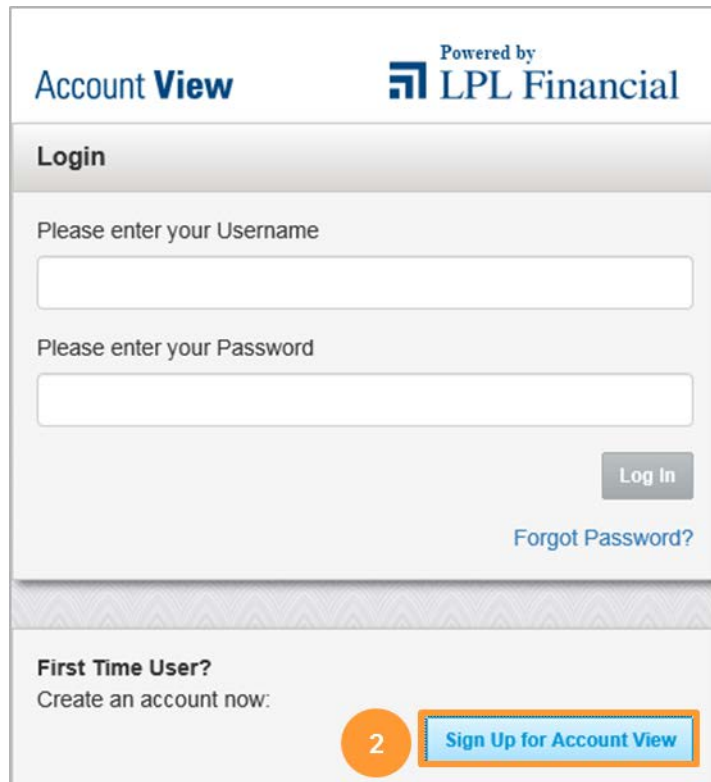
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Access Account View

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**.

A screenshot of the Account View login page. The page header includes "Account View" and "Powered by LPL Financial". The main section is titled "Login" and contains two input fields: "Please enter your Username" and "Please enter your Password". Below the password field is a "Log In" button and a "Forgot Password?" link. At the bottom of the page, there is a "First Time User?" section with the text "Create an account now:" and a "Sign Up for Account View" button. An orange circle with the number "2" is placed over the "Sign Up for Account View" button.

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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**.

Please Validate User Information ⓘ

For security purposes, please enter the following information. If you are not the primary account holder, please contact the financial advisor to continue.

*Last 4 digits of Social Security or Tax ID Number

*Account Number

*Zip or Postal Code

Continue

Create Your Profile

1. Create your **User Name**.

Create User Name and Password

Create User Name

*User Name

Test Availability

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

Create User Name and Password

Create User Name

*User Name

Test Availability

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

Create Password

Between 8 to 20 characters in length
Must not contain username
No more than 3 of the same characters in a row
No spaces
At least 3 of the following 4 characteristics:

- 1 Upper Case Letter
- 1 Lower Case Letter
- 1 Number
- 1 Special Character ~ @ # % ^ - _ + = { } [] : ? ! \$ * ; / \

*New Password

*Confirm Password

Cancel Continue

4. Click **Continue**.

*New Password

*Confirm Password

Cancel Continue

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

Contact Information

*First Name: Middle Name: *Last Name:

Phone Number: Mobile Number:

*Email: *Confirm Email:

Manage Accounts

Account Number	Zip Code	*Nick	Delete
3396-1000	01945	BROKER/WRK 33961000	<input type="checkbox"/>

◆ Add Account

Cancel Continue

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

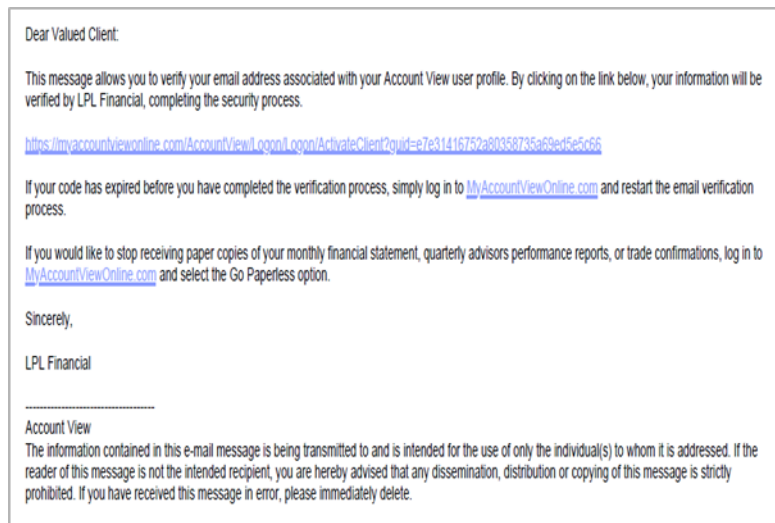
- Once you have added your account(s), click **Continue**.

The screenshot shows the 'Manage Accounts' interface. At the top, there are three input fields: 'Account Number', 'Zip Code', and '*Nickname'. To the right of these fields is a 'Delete' button. Below the input fields is a blue '+Add Account' button. A red box highlights the '+Add Account' button, and a red circle with the number 6 is placed below it. Another red box highlights the three input fields, and a red circle with the number 7 is placed below it. At the bottom right, there are 'Cancel' and 'Continue' buttons.

The screenshot shows the 'Manage Accounts' interface after an account has been added. The 'Account Number' field now contains '3396-1000', the 'Zip Code' field contains '01945', and the '*Nickname' field contains 'BROKER-NR 33961000'. The '+Add Account' button is still present. A red box highlights the 'Continue' button at the bottom right, and a red circle with the number 8 is placed below it. The 'Cancel' button is also visible.

Retrieve Email

- 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.



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Validate User Information

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

Complete Site Registration

Please enter your Username

Please enter your Password

1

2 Continue

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

Site Terms and Conditions

ACCOUNT VIEW AUTHORIZATION AND TERMS OF USE

Account View is the easy and effective on-line access to your account information. From within Account View you can view your account balances, positions and transactions.

As a condition to activating Account View services, please read the following and indicate your acceptance below. By indicating acceptance, you agree to follow Account View's Terms of Use and hereby understand, acknowledge and agree:

Terms of Use

Terms and Conditions

Data supplied to you by LPL Financial is for informational purposes only. This information is not intended to replace the LPL Financial periodic statement of activity you receive.


3 Agree Disagree

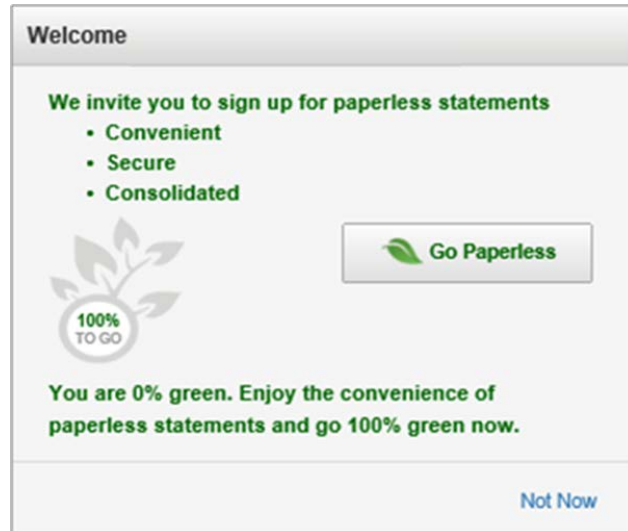
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Go Paperless

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.



Welcome

We invite you to sign up for paperless statements

- Convenient
- Secure
- Consolidated



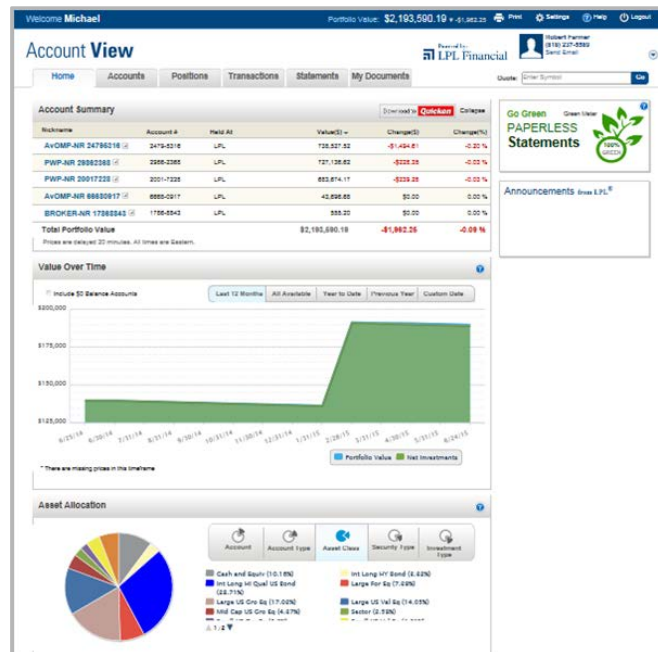


You are 0% green. Enjoy the convenience of paperless statements and go 100% green now.

[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!



Welcome Michael | Portfolio Value: \$2,193,690.19

Account View

Home | Accounts | Positions | Transactions | Statements | My Documents

Account Summary

Nickname	Account #	PAID AS	Value(\$)	Change(\$)	Change(%)
AvCMP-ADR 24786216	2478-6216	LPL	726,527.92	-91,494.81	-11.07%
PMP-ADR 29982368	2998-2368	LPL	721,138.82	\$228.28	0.03%
PMP-ADR 20017228	2001-7228	LPL	822,874.17	\$228.28	0.03%
AvCMP-ADR 68820917	6882-0917	LPL	42,266.68	\$0.00	0.00%
BROKER-ADR 17368843	1736-8843	LPL	366.20	\$0.00	0.00%
Total Portfolio Value			\$2,193,690.19	-\$1,962.25	-0.09%

Value Over Time

Asset Allocation

- Cash and Equiv (10.18%)
- Int Long Mkt Bond (4.82%)
- Int Long US Qual US Bond (28.71%)
- Large US Div Eq (17.02%)
- Int Long US Div Eq (4.97%)
- Large US Int Eq (14.05%)
- Small Cap US Div Eq (14.05%)
- Large For Eq (17.02%)



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