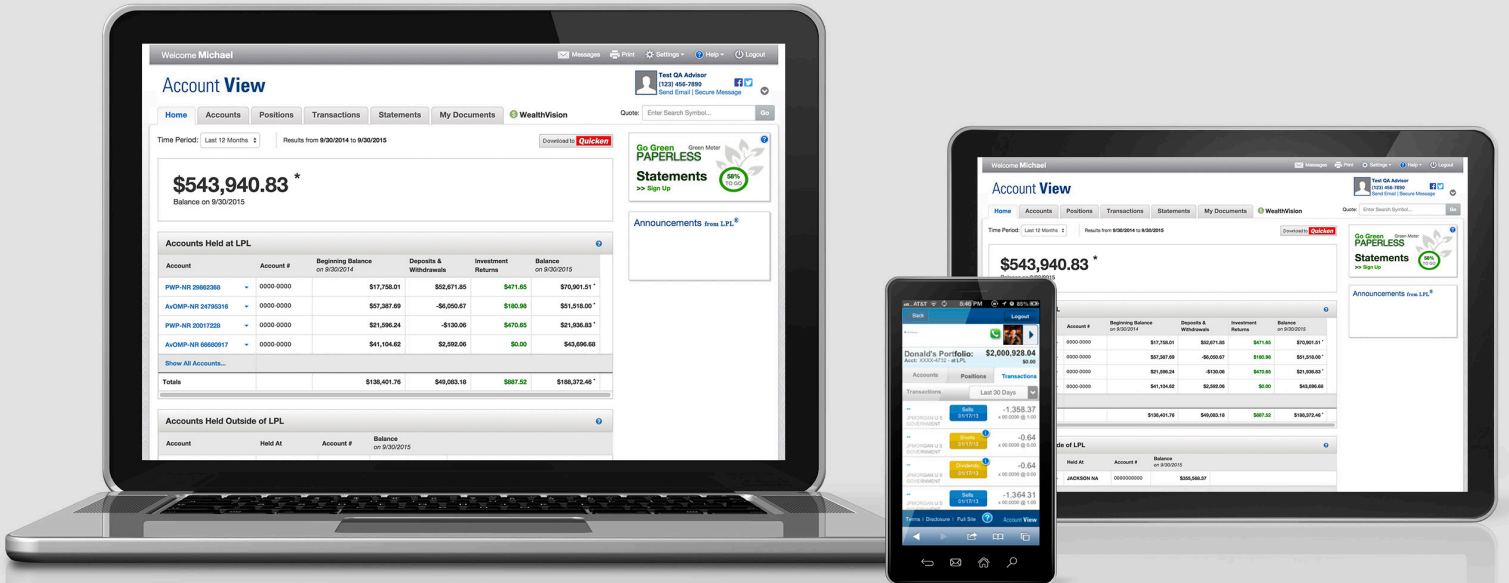


# Go Digital with Account View and eDelivery

Secure financial account access anytime, anywhere, on any device.



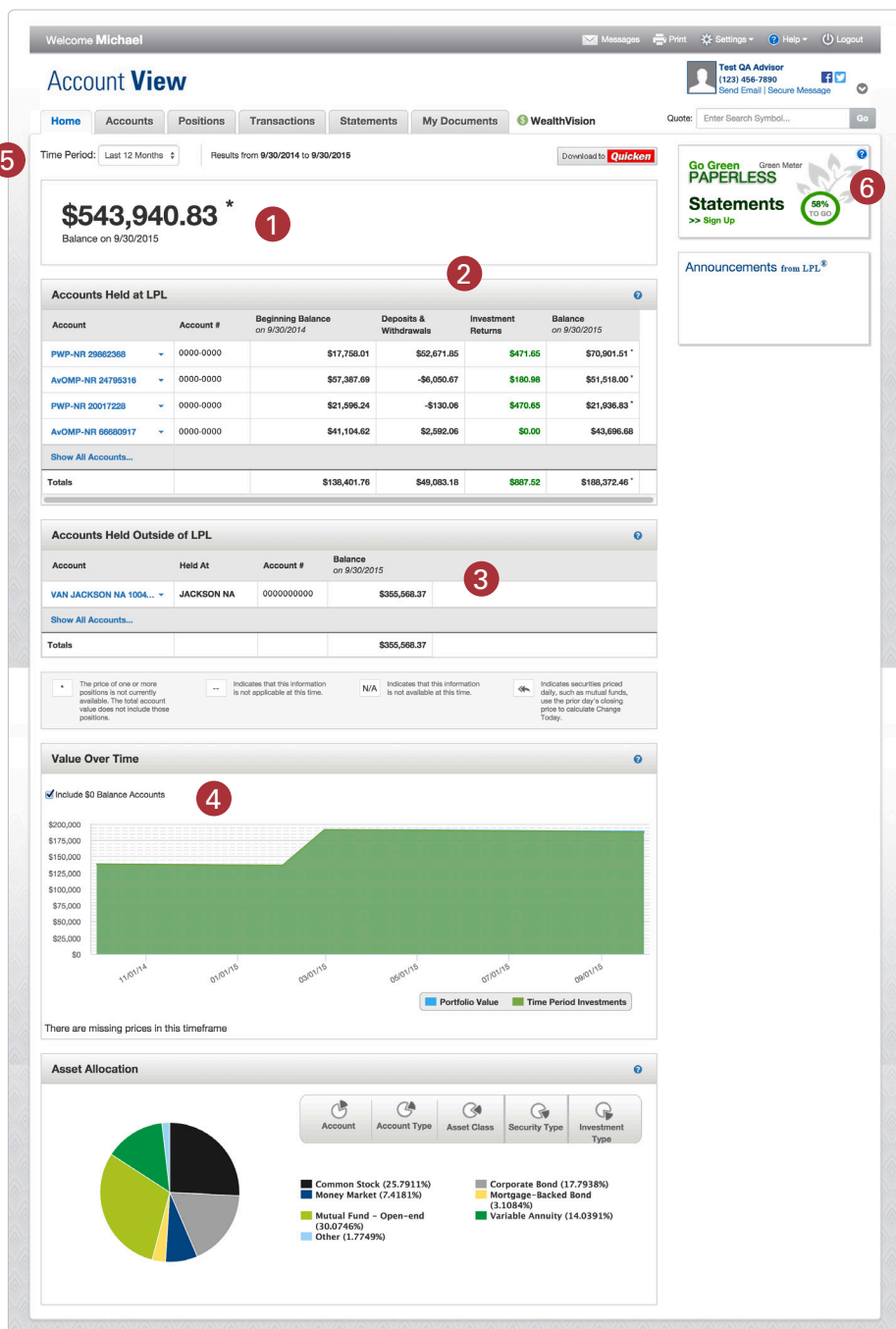
Say goodbye to snail mail, clutter, and information that's outdated the moment it's printed. Say hello to secure, constant, anywhere online access to your financial information with Account View and eDelivery.

## Understanding Your Accounts

- 1 Easily view the total portfolio value for all of your accounts at the top of the homepage.
- 2 Monitor individual account balances, deposits, and withdrawals and investment returns.
- 3 Distinguish between accounts held at LPL and those held outside, and check balances for outside accounts.
- 4 Keep track of how your investments performed at a specific time or over a period of time by simply hovering over the value over time chart.

## Tracking Your Accounts

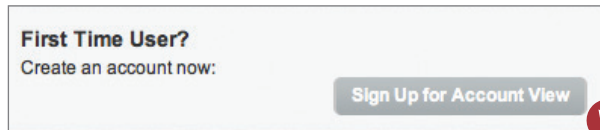
- 5 View account performance by time period using the time selector tool.
- 6 Receive statements, tax documents, and trade confirmations electronically with eDelivery.



# GETTING STARTED

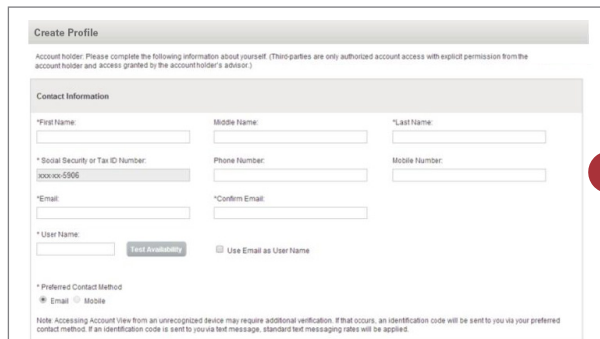
Enrolling is easy. Follow these simple steps:

1



Visit [www.myaccountviewonline.com](http://www.myaccountviewonline.com) and click Sign Up for Account View.

2



**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:

\* User Name:  [Test availability](#)  Use Email as User Name

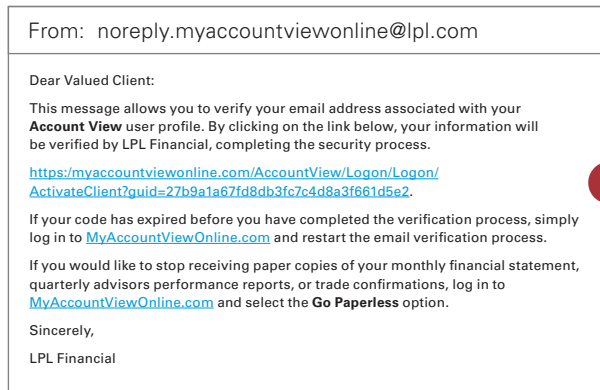
\* Preferred Contact Method  
 Email  Mobile

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.

Create your confidential and secure profile.

*You'll be asked to enter your contact information, and verify the last four digits of your Social Security number. It's secure and safe—we use this information to protect your account.*

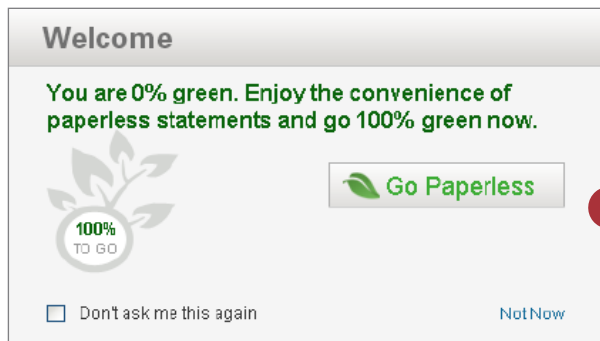
3



Verify your account.

*You'll receive an email confirmation to the email address you provided. Only you have access to that email, and only you can activate your Account View access.*

4



Opt in to eDelivery by clicking Go Paperless.

*Eliminate printed monthly statements and trade confirmations through the mail. You have secure and private access to view these documents online through Account View.*

To the extent you are receiving investment advice from a separate registered independent investment advisor, please note that LPL Financial is not an affiliate of and makes no representation with respect to such entity.

Not FDIC/NCUA Insured	Not Bank/Credit Union Guaranteed	May Lose Value	Not Insured by any Federal Government Agency	Not a Bank Deposit
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LPL Financial, a registered investment advisor. Member FINRA/SIPC

