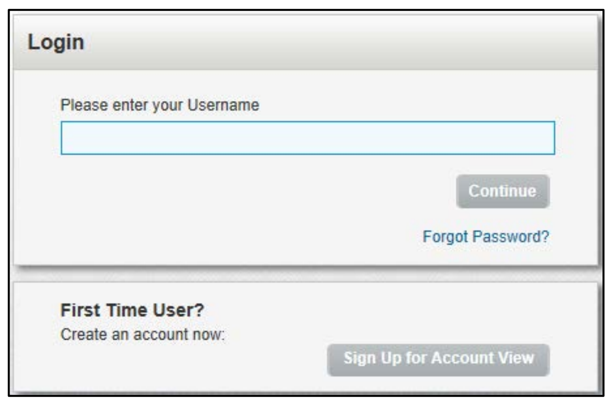
Account View

Getting Started

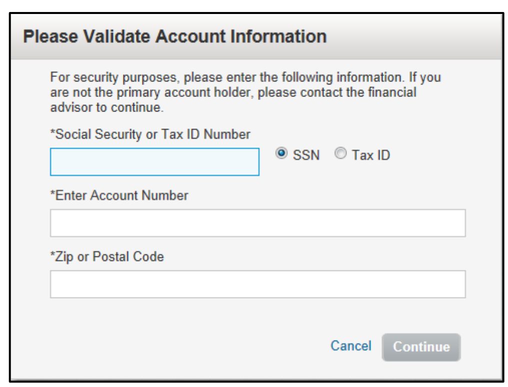
Before getting started:

- 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 Sign Up for Account View



Step 3: Enter your social security number or tax ID number, any one of your LPL account numbers, and zip code and select Continue

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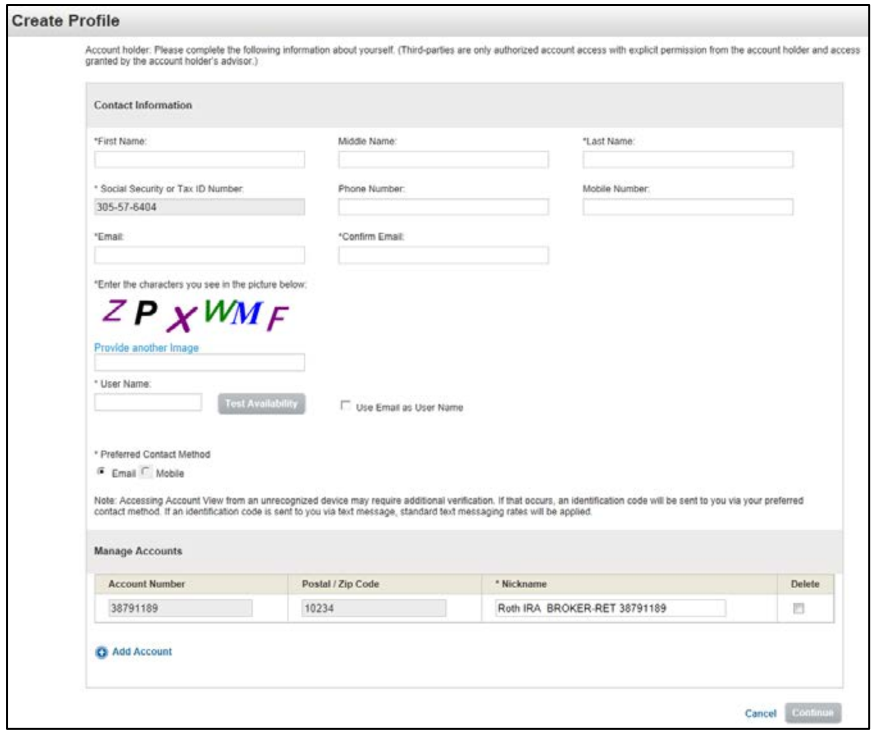
Step 4: Create your profile by adding the required information, choose a password, and select a security image.

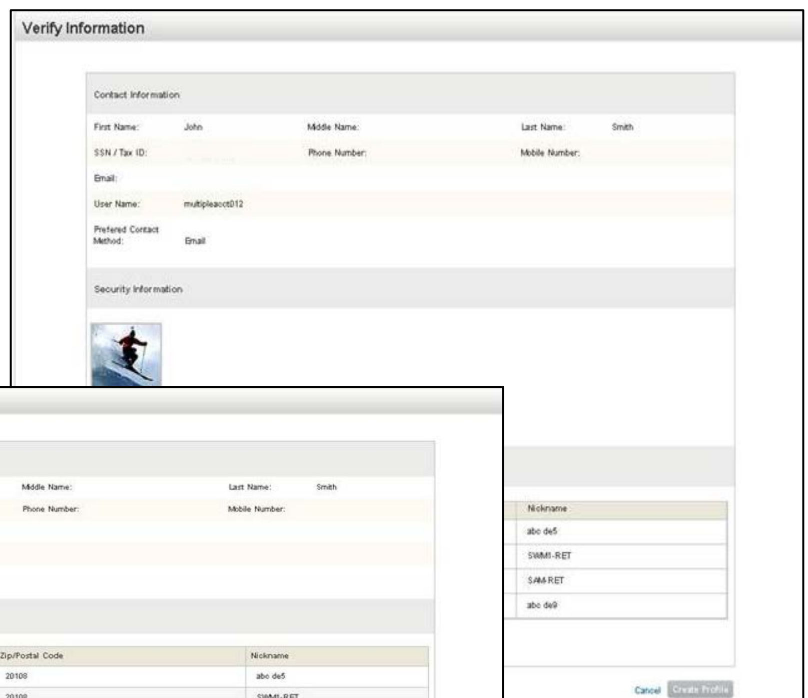
Review your listed account(s). To add an additional account select Add Account , enter the Account Number and Nickname to refer to the account.

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

When you are ready to proceed, select Continue

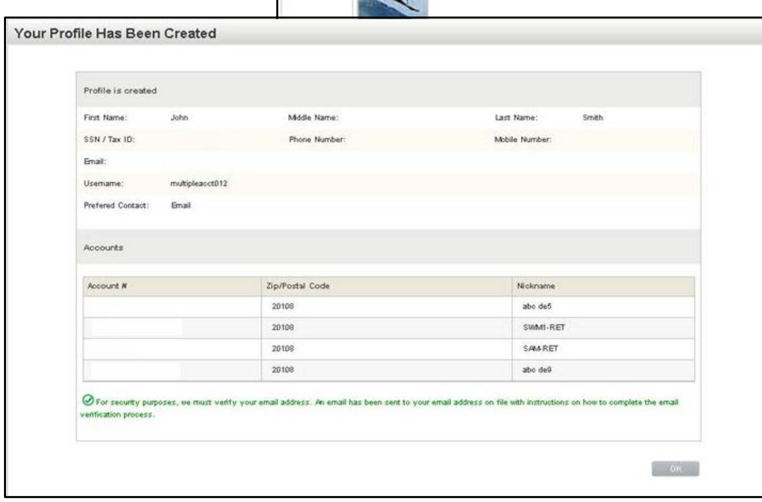


Step 5: Verify the information you have entered in your profile and select Create Profile



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

Select OK and close your browser window.



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

Select the <u>first</u> 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,

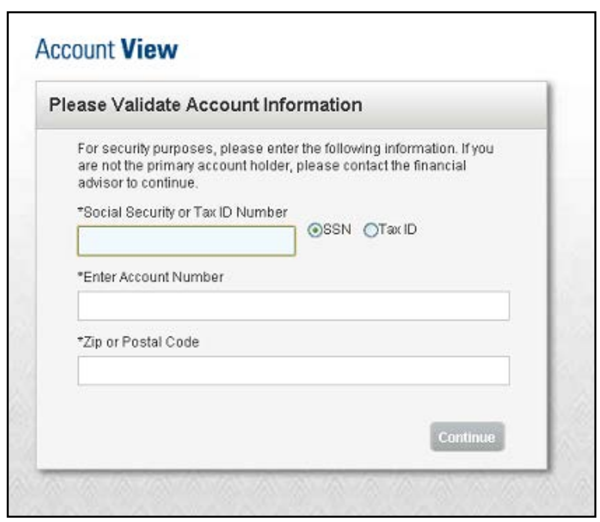
LPL Financial

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

Enter your Username and select Continue

Step 9: Enter your Social Security or Tax ID Number, any one of your LPL Account Numbers, and your Zip Code.

Select Continue



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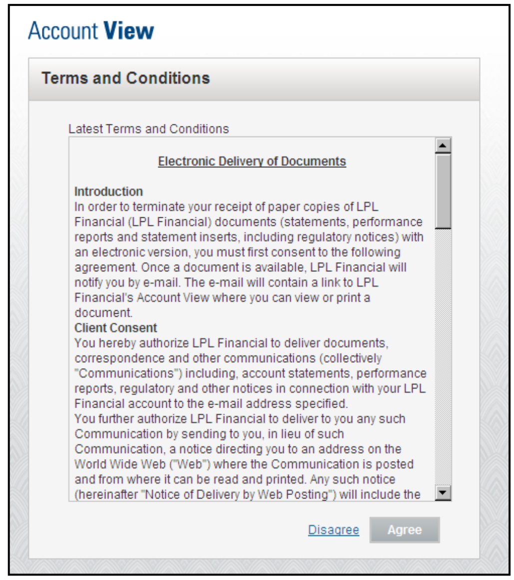
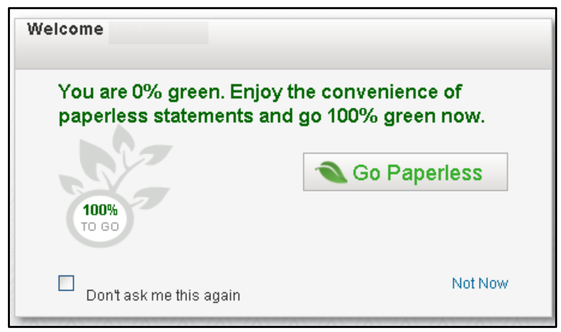
Step 10: Agree to the site Terms and Conditions by selecting Agree



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



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

Select Close 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.