

# ACCOUNT VIEW 2.0

## New Investor Self-Provisioning How To Guide

### Overview

This guide explains how Investors can self-register for Account View 2.0.

### Icons



Alert or Important



Information or Note



Frequently Asked Questions

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## Signing Up for Account View 2.0

1. Go to <https://myaccountviewonline.com/login/>. Select **Sign Up**.

Welcome to the new Account View login page!  
Your saved password may not autofill. You can manually enter or reset it on the next page.

### Sign In to Access Your Accounts

Username  
[ ]


[Trouble logging in?](#)

NEXT >

New? Sign up for Account View!  
Account View is a safe and secure way to view balances, review transactions, and see your financial progress.

1 SIGN UP

2. Enter your email, phone, and last four digits of SSN that you provided to your financial professional. Then complete the **reCAPTCHA**. All fields are required.

 Enter your **Mobile Phone**. If you have difficulty creating your profile, please contact your financial professional.

3. Select **Find Me** to continue.

### Create your account

Let's find you in our system!

Please use the same information you provided to your financial professional.

Email  
[ lpl@lpl.com ]

Phone  
[ (800) 877-7210 ]

Last Four Digits of SSN  
[ 1234 ]

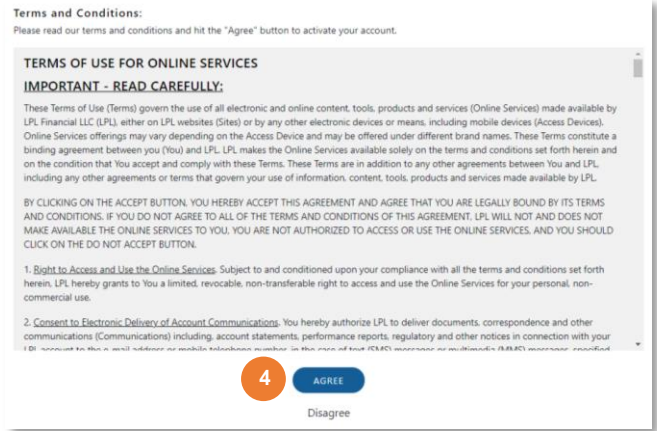
2 I'm not a robot

3 FIND ME >

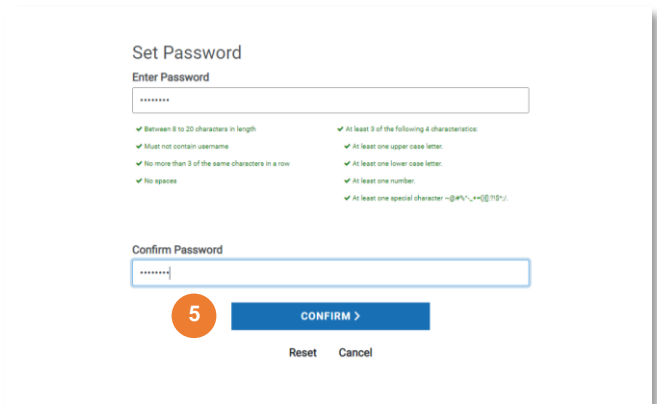
Having trouble? Contact your financial professional.

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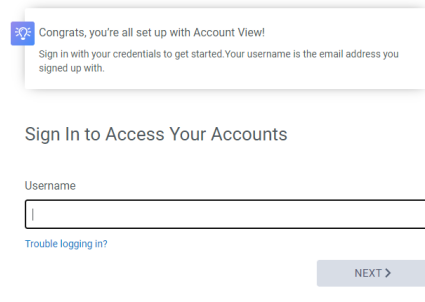
4. Review and **Agree** to the **Terms and Conditions**.




5. Create and **Confirm** your password.

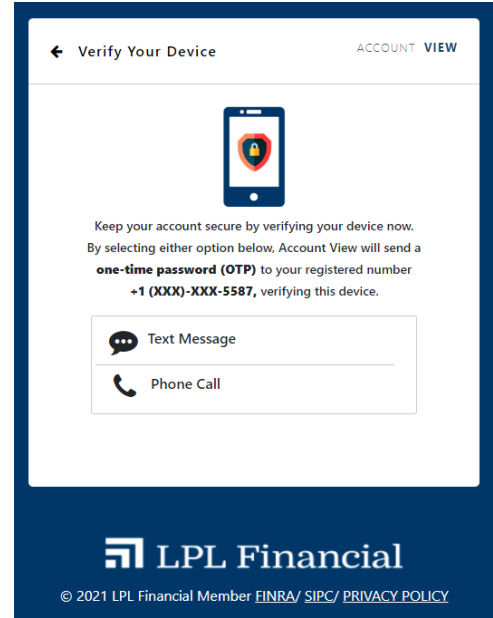


6. Login with your new credentials.

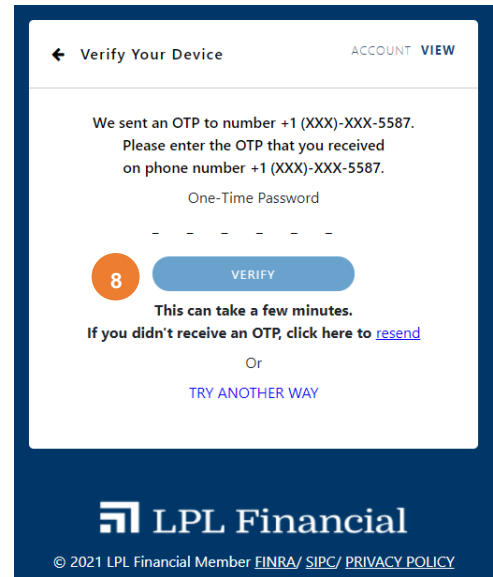


7. Select your verification method using your device to receive the **one-time password (OTP)** sent to your registered phone number.

 You can receive your **one-time password (OTP)** via text message or a phone call.



8. Enter your code, then click **Verify**. Your Account View 2.0 homepage will appear.



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