

Account View | Getting Started Guide

Introduction

This guide will walk you through how to create a profile in Account View. Here are a few things to keep in mind:

- You can access Account View via your 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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Financial Professional Creates Client Profile

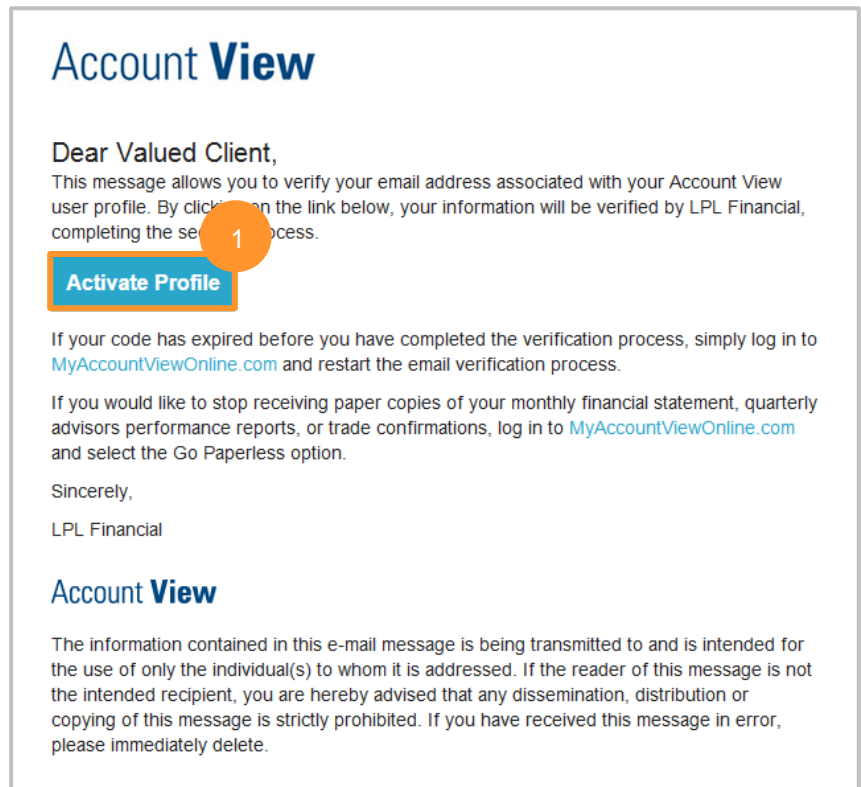
An alternative way an Account View profile can be activated is for the financial professional to create a profile for the client. Once they create the profile, the system generates an email for the client to activate it.

1. Click the **Activate Profile** button in the email to start the activation process.



Depending on the email provider, the client may not see the button that says '**Activate Profile**'. They will need to **right click the red X boxes** and select '**Download Pictures**'.

2. Enter your **Username** on the **Complete Site Registration** screen.
3. Click **Continue**.



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4. Complete the information needed on the **Validate User Information** screen.

- Enter the **last 4 digits of your Social Security or Tax ID number**.
- Enter one of your **LPL Financial Account Numbers**.
- Enter your **Zip or Postal Code**.
- Click **Continue**.

Account View

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

Cancel Continue

5. Select a **Password**

 Follow the requirements when setting your password.

6. Click **Submit**

Account View

Set 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 ~ @ # % ^ - _ + = { } [] : ? ! \$ * ' / \

*Enter Password:

*Confirm Password

Submit

7. Review and agree to the **Site Terms and Conditions** by selecting **Agree**.

Account View

Site Terms and Conditions

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.

Market Value of Priced Securities

This amount represents the total market value of the priced securities listed in your portfolio. While we make every attempt to gather the most reliable pricing data available, we cannot guarantee the accuracy of such prices. Pricing vendors provide securities prices that they believe to be accurate and reliable. Prices on securities are updated either daily, weekly or monthly, depending on the security type. Since each vendor prices securities at different times of the month, discrepancies may occur. Vendors do not price all

Disagree Agree

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Go Paperless

You can eliminate mailings and enjoy online access of your statements and trade confirmations by clicking **Go Paperless**.



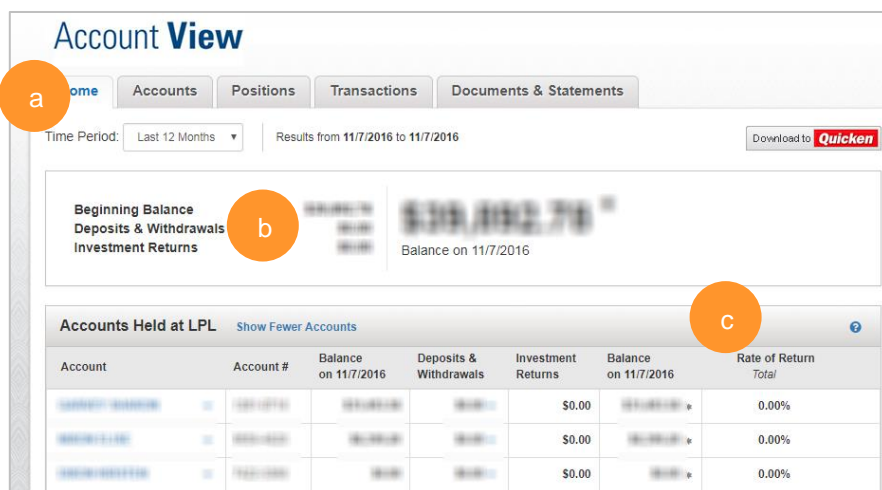
The **Go Paperless** prompt only displays if you are registering on a desktop device.

You can opt to **Go Paperless** or skip it by clicking **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!



- Select the **time period** you want and it will apply across your summaries and value over time chart.
- You can see the **beginning and ending balance**, as well as **deposits and withdrawals**, for the selected time period.
- See how your **investments have performed** over time, including reinvested dividends, based on dollars you've invested.



Please see the Account View brochure for instructions to customize your settings and/or reset your password.

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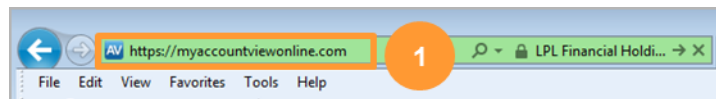
Access Account View

There are two ways a client can be setup in Account View.

- One is to allow the clients to create a profile themselves.
- Second would be for the financial professional to go into Account View and create a profile for the client. The process will generate an email for the client to activate the profile.

Client Creates Profile

1. Access Account View through your financial professional'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 has a header "Account View" and a "Login" section with fields for "Username" and "Password", a "Log In" button, and a link "Trouble logging in?". Below the login section is a "First Time User?" section with the text "Create an account now:" and a "Sign Up for Account View" button. The button is highlighted with an orange rectangular box, and a circled orange number "2" is placed next to it.

3. Enter the last 4 digits of your **Social Security Number (SSN)** or **Tax ID number**, **Account Number** and your **Zip** or **Postal Code**.



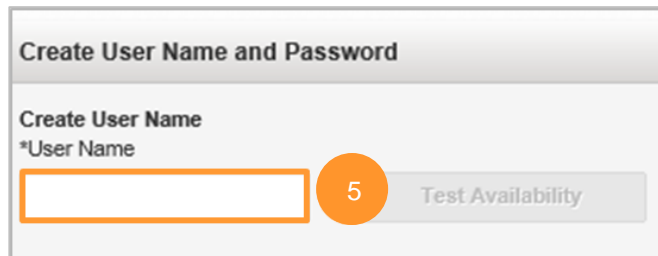
The zip code and SSN entered have to match what is on the account.

4. Once you have entered your information, click **Continue**.

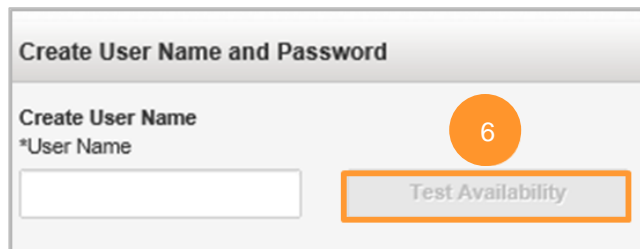
A screenshot of a form titled "Please Validate User Information". The form contains three input fields: "*Last 4 digits of Social Security or Tax ID Number", "*Account Number", and "*Zip or Postal Code". The first field is highlighted with an orange box and a circled orange number "3". The second and third fields are also highlighted with orange boxes. At the bottom right, there are "Cancel" and "Continue" buttons. A circled orange number "4" is placed next to the "Continue" button.

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5. Create your **User Name**.



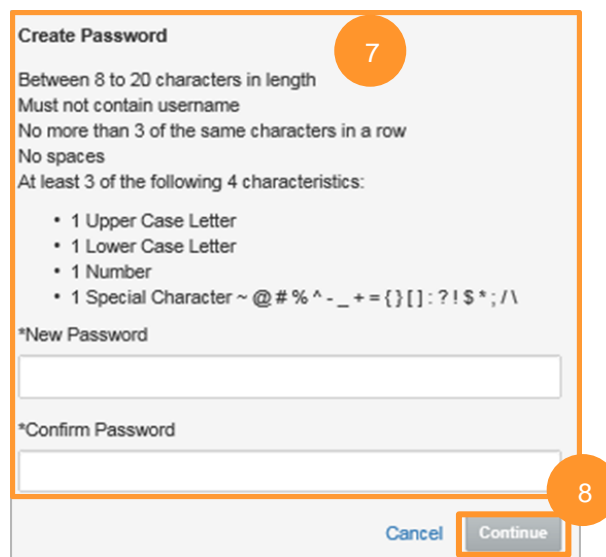
6. Click **Test Availability** to check if your desired **user name** is available. If not, select a new **User Name**.



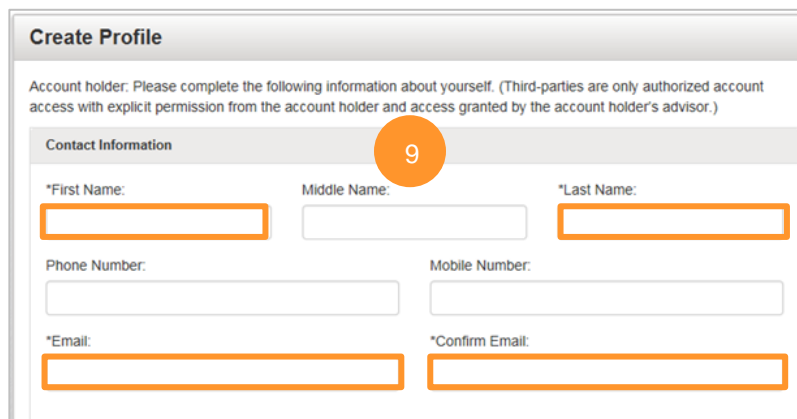
7. Select a **Password**.

- Take note of the password requirements when choosing your password.

8. Click **Continue**.



9. Enter your **Contact Information**.



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10. Enter **Account Number** and a **Nickname** for the account.

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



Clients can only add accounts where their SSN is the primary (i.e. a husband cannot add his wife's accounts or trust accounts since they have different SSNs/tax IDs than the Account View profile. The financial professional would have to add these.)

12. Click **Continue**.



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

13. Verify the information is correct and click **Create Profile**.

14. Click **Close** on the **Success** window.

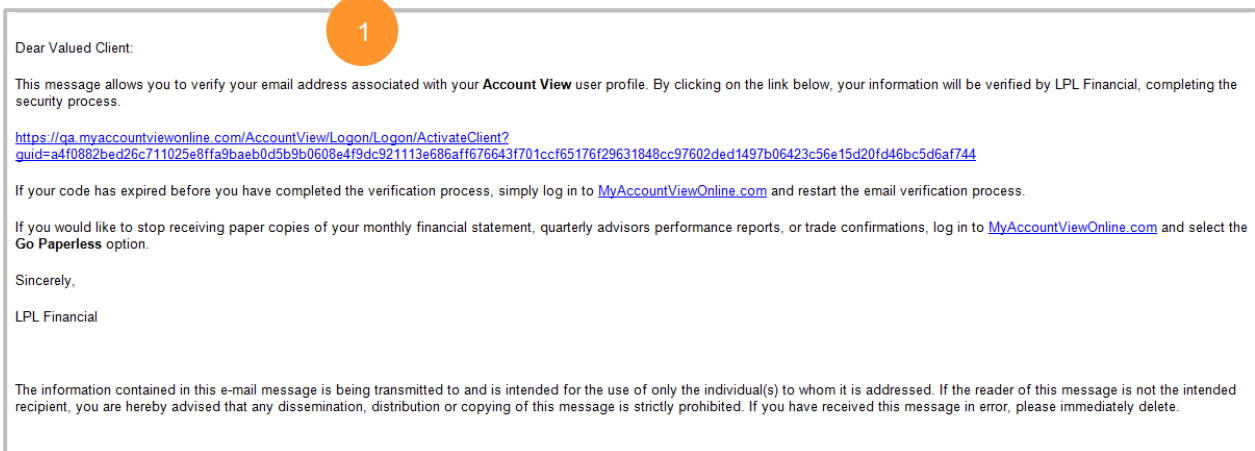
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Retrieve Email

Once you have completed your profile you will receive an email in order to verify the Account View profile and email address.

Follow the steps provided in the email to verify your Account View profile and email address.

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



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