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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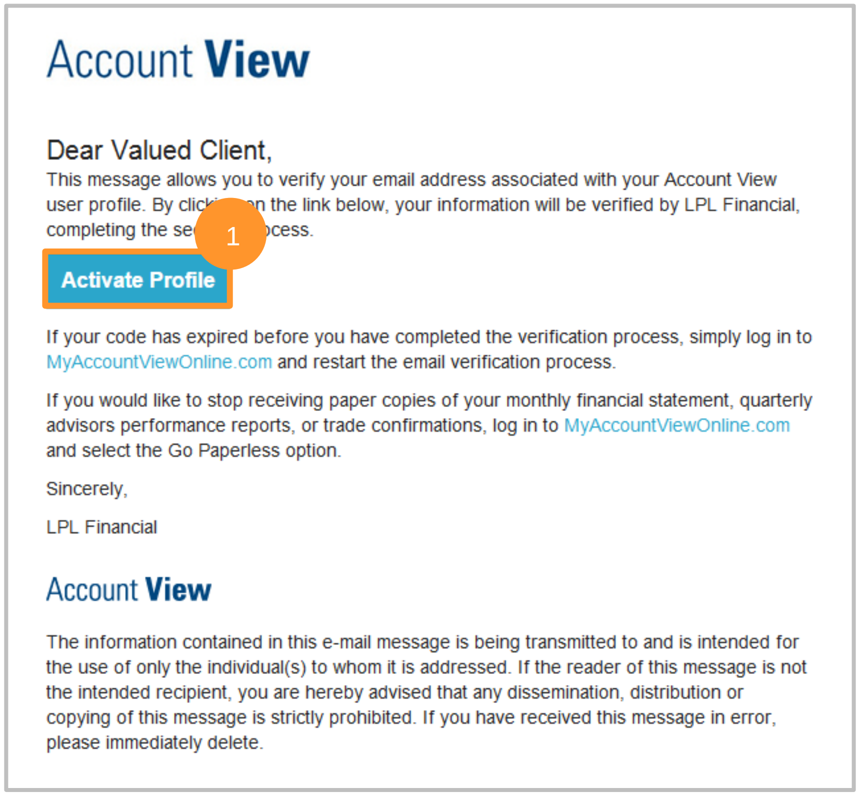
Financial Professional Creates Client Profile

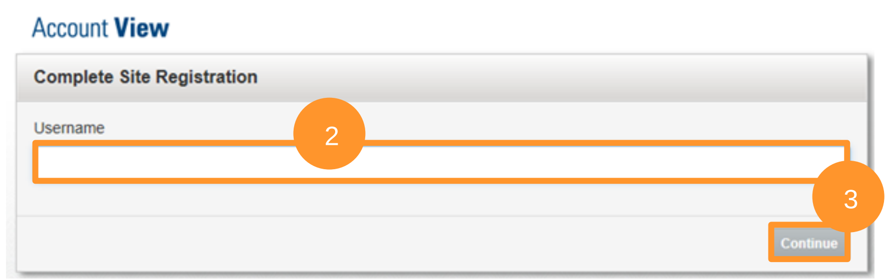
An alternative way an Account View profile can be activated is for the financial professional to create a profile for the client. Once they create the profile, the system generates an email for the client to activate it.

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**.



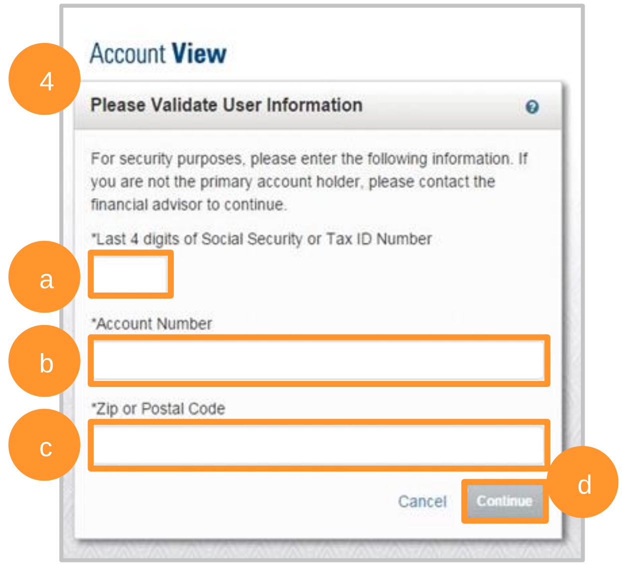
4. Complete the information needed on the **Validate User Information** screen.

   a) Enter the **last 4 digits of your Social Security or Tax ID number.**

   b) Enter one of your **LPL Financial Account Numbers.**

   c) Enter your **Zip** or **Postal Code.**

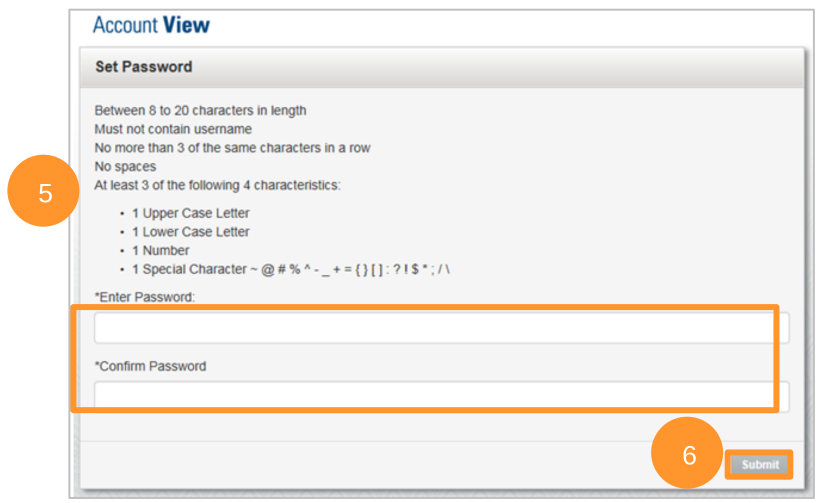
   d) Click **Continue.**



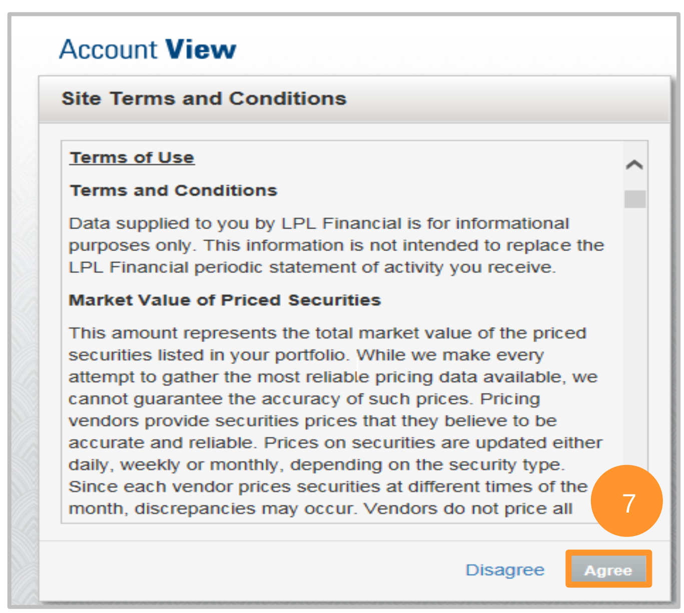
5. Select a **Password**

   Follow the requirements when setting your password.

6. Click **Submit**

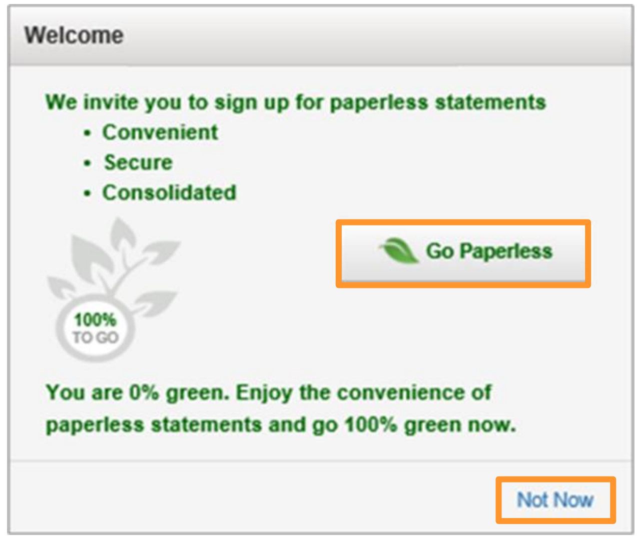


7. **Review and agree** to the **Site Terms and Conditions** by selecting **Agree**.



Go Paperless

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

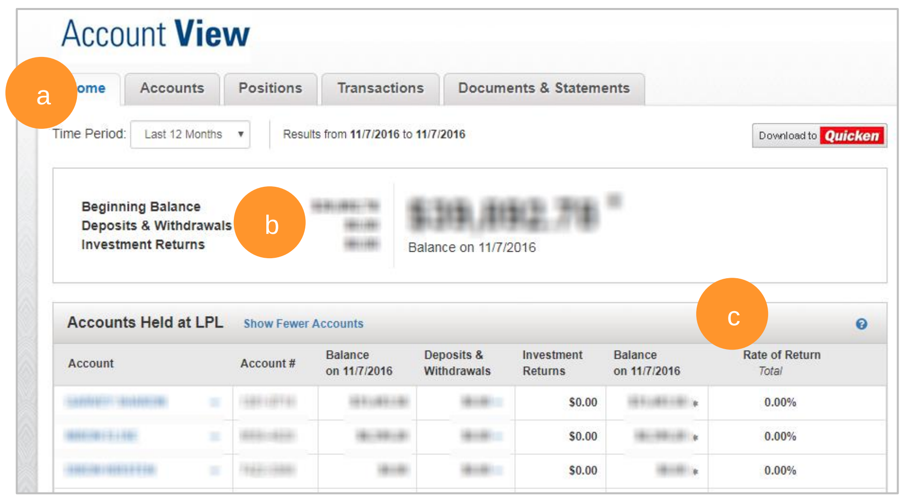


The **Go Paperless** prompt only displays if you are registering on a desktop device.

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!



a) Select the **time period** you want and it will apply across your summaries and value over time chart.

b) You can see the **beginning and ending balance**, as well as **deposits and withdrawals**, for the selected time period.

c) 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.

Access Account View

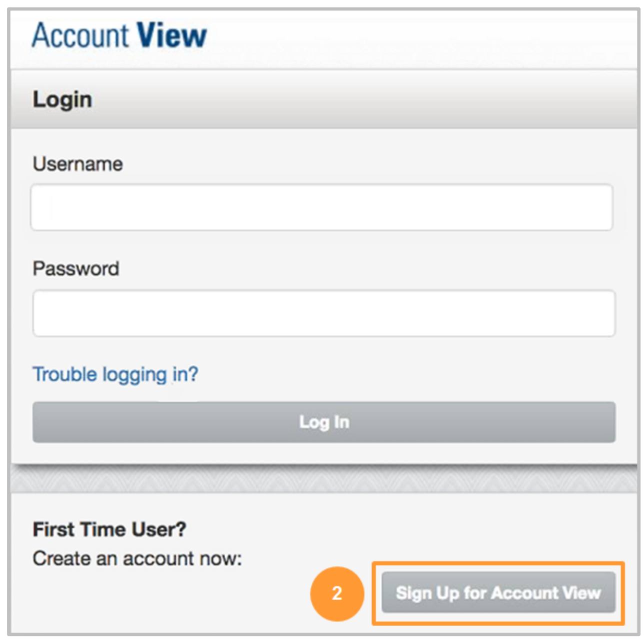
There are two ways a client can be setup in Account View.

- 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.

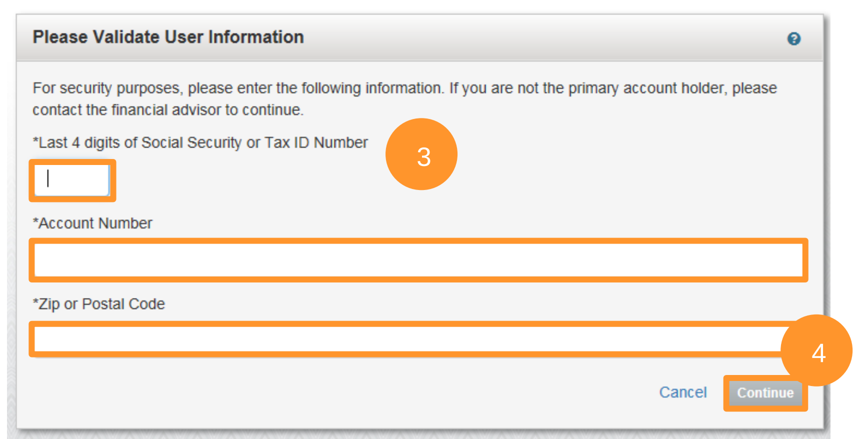
2. Create an account by clicking **Sign Up for Account View**.



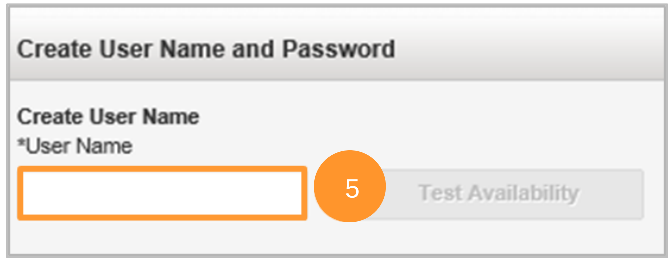
3. Enter the last 4 digits of your **Social Security Number** (SSN) or **Tax ID number**, **Account Number** and your **Zip** or **Postal Code.**

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

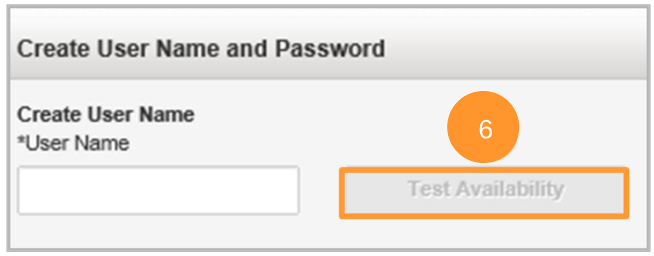
4. Once you have entered your information, click **Continue.**



5. Create your **User Name**.



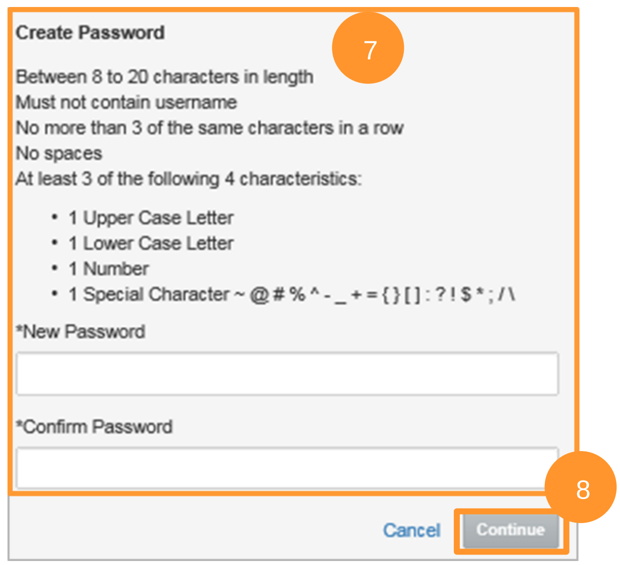
6. Click **Test Availability** to check if your desired **user name** is available. If not, select a new **User Name**.



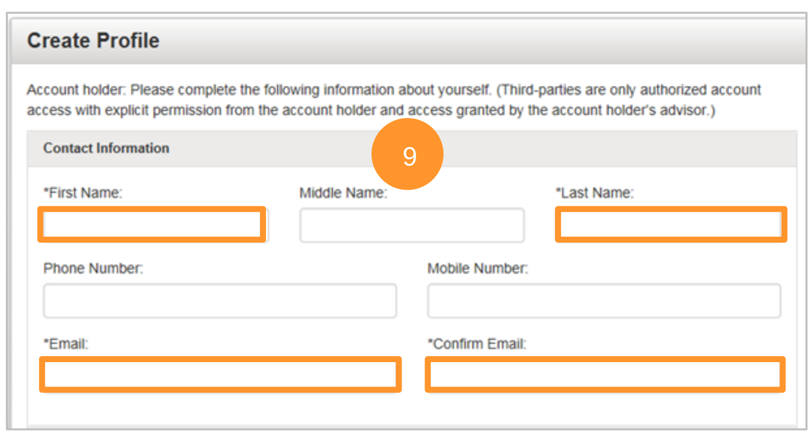
7. Select a **Password**.

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

8. Click **Continue.**

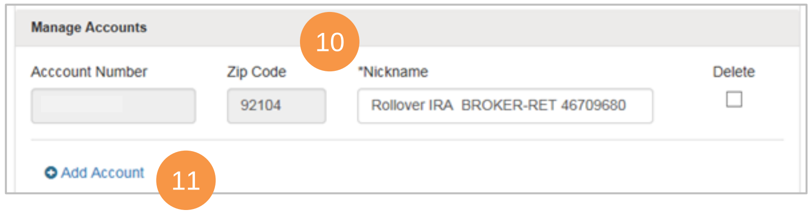


9. Enter your **Contact Information**.

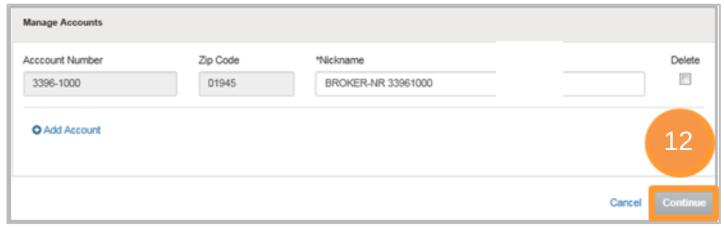


10. Enter **Account Number** and a **Nickname** for the account.

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.)

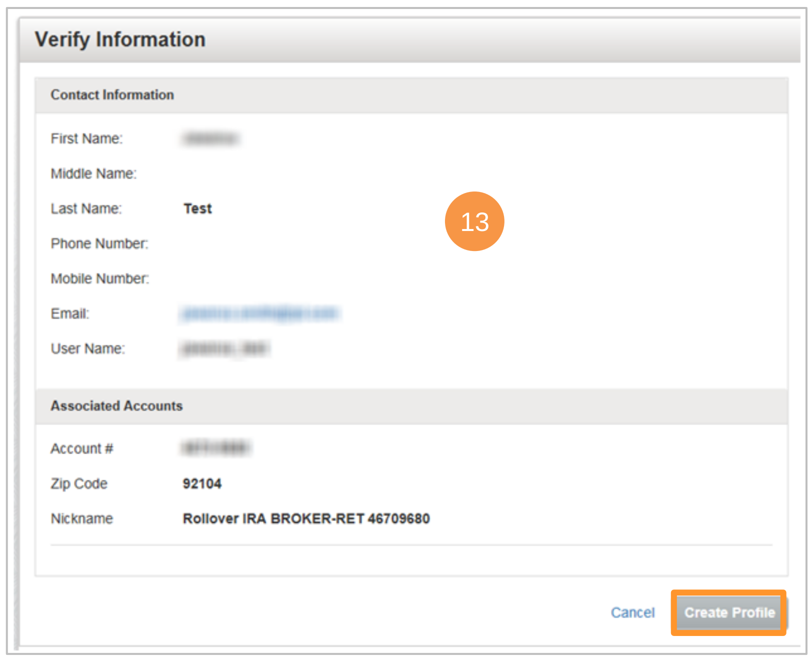


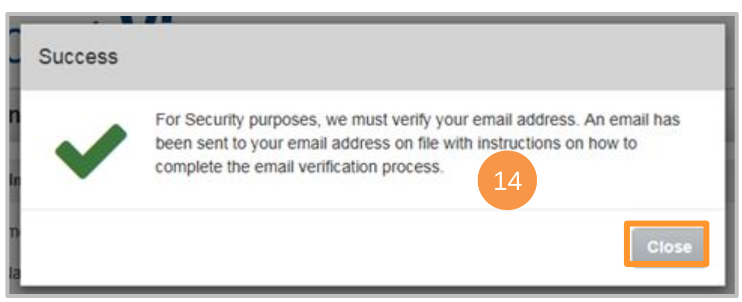
12. Click **Continue**.

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**.**





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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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=a4f0882bed26c711025e8ffa9baeb0d5b9b0608e4f9dc921113e686aff676643f701ccf65176f29631848cc97602ded1497b06423c56e15d20fd46bc5d6af744

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

The information contained in this e-mail message is being transmitted to and is intended for the use of only the individual(s) to whom it is addressed. If the reader of this message is not the intended recipient, you are hereby advised that any dissemination, distribution or copying of this message is strictly prohibited. If you have received this message in error, please immediately delete.