Account View
Getting Started User Guide

Introduction

This User Guide walks you through the steps to create a profile in Account View. Here are a few things to keep in mind:

- The first time you access Account View and going forward, you can do so on your desktop 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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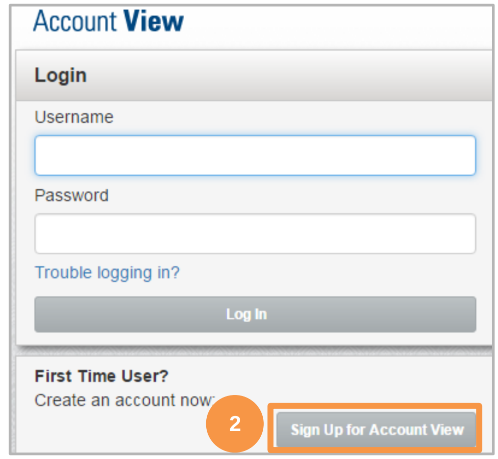
Access Account View

1. Access Account View through your Financial Advisor's website or directly at: myaccountviewonline.com.

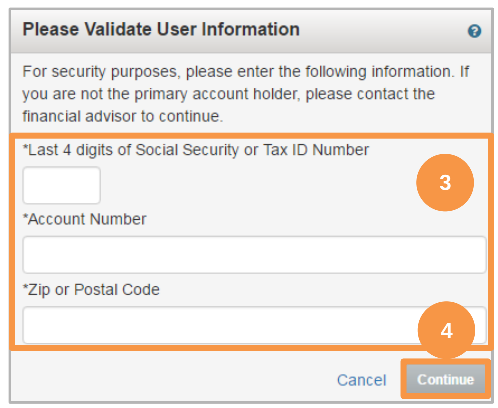
2. Create an account by clicking **Sign Up for Account View**.



3. Enter the last 4 digits of your **Social Security Number** or **Tax ID Number**, one of your LPL Financial **Account Numbers** and your **Zip or Postal Code**.

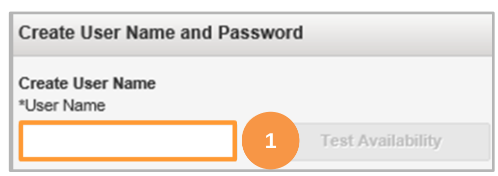
The zip code and SSN you enter have to match what is on the account.

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

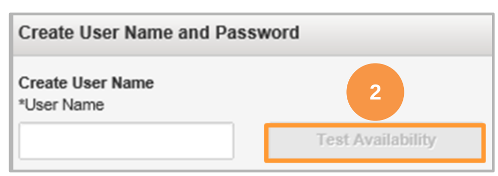


Create Your Profile

1. Create a **User Name** by typing a name into the **User Name** field.



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



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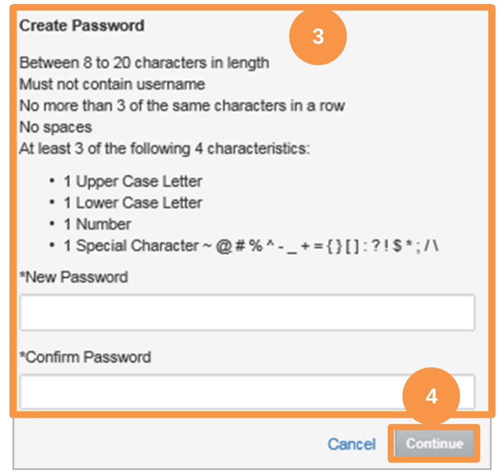
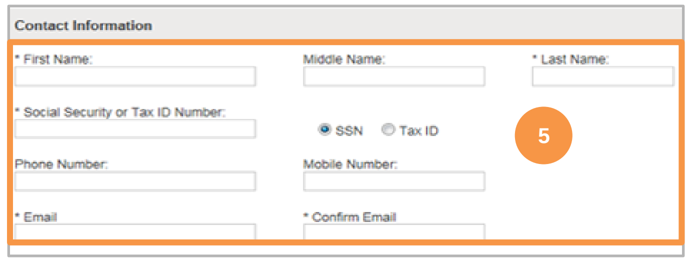
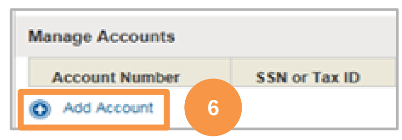
3. Select a **Password**. Take note of the Password requirements when choosing your password.
4. Click **Continue**.



5. Fill in your **Contact Information**. Fields marked with an asterisk (*) are mandatory. The others are optional.



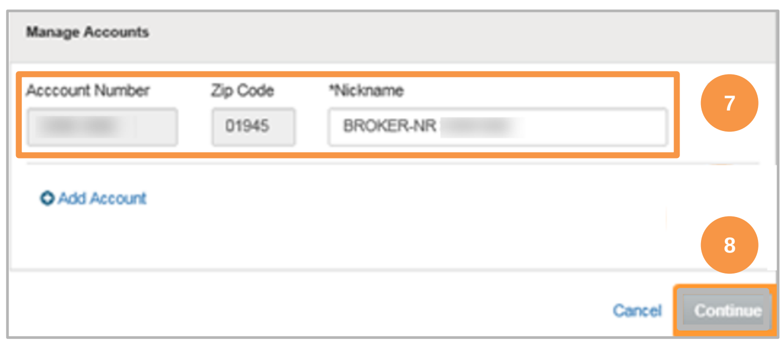
6. To add accounts to your profile, select **+Add Account.**



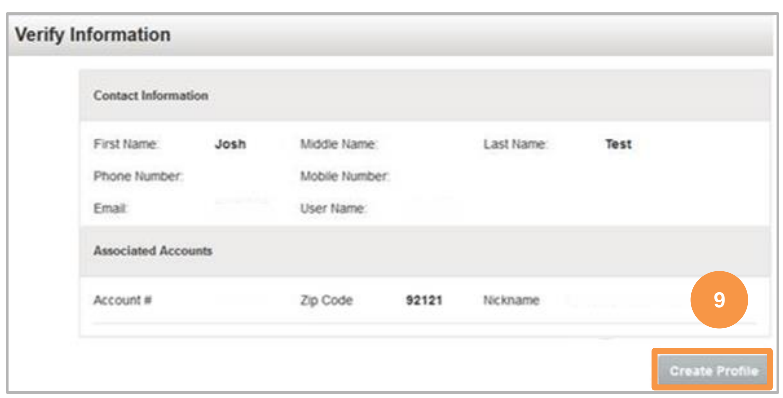
7. In the blank fields, enter an **Account Number** and a nickname for the account.

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

8. Once you have added your account(s), click **Continue**.



9. Verify that the information is correct, then click **Create Profile**.



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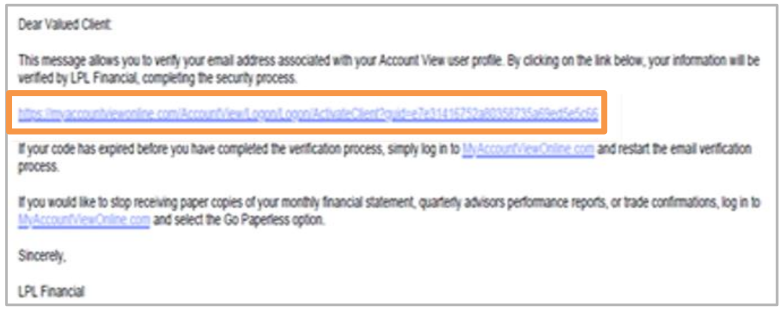
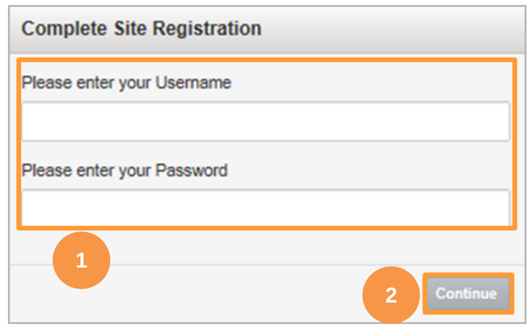
Retrieve Email

Go to your email and open the message from: **noreply.myaccountviewonline@lpl.com**. Click on the **activation link** in the email to activate your profile.

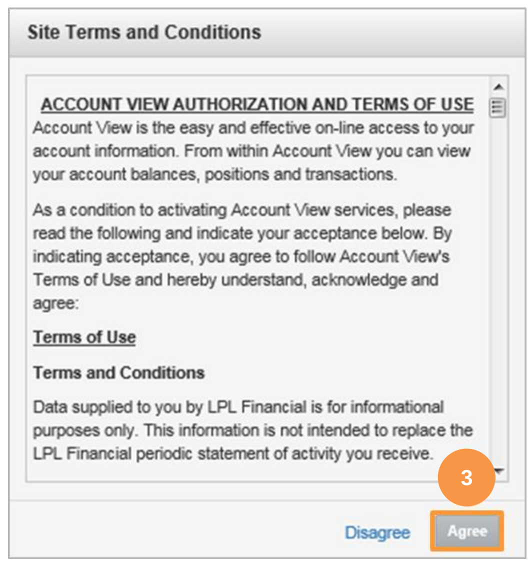


Validate User Information

1. You will be presented with the Account View login screen. Enter your **Username** and **Password**.
2. Click **Continue**.



3. 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 will only display if you are activating on a desktop device.

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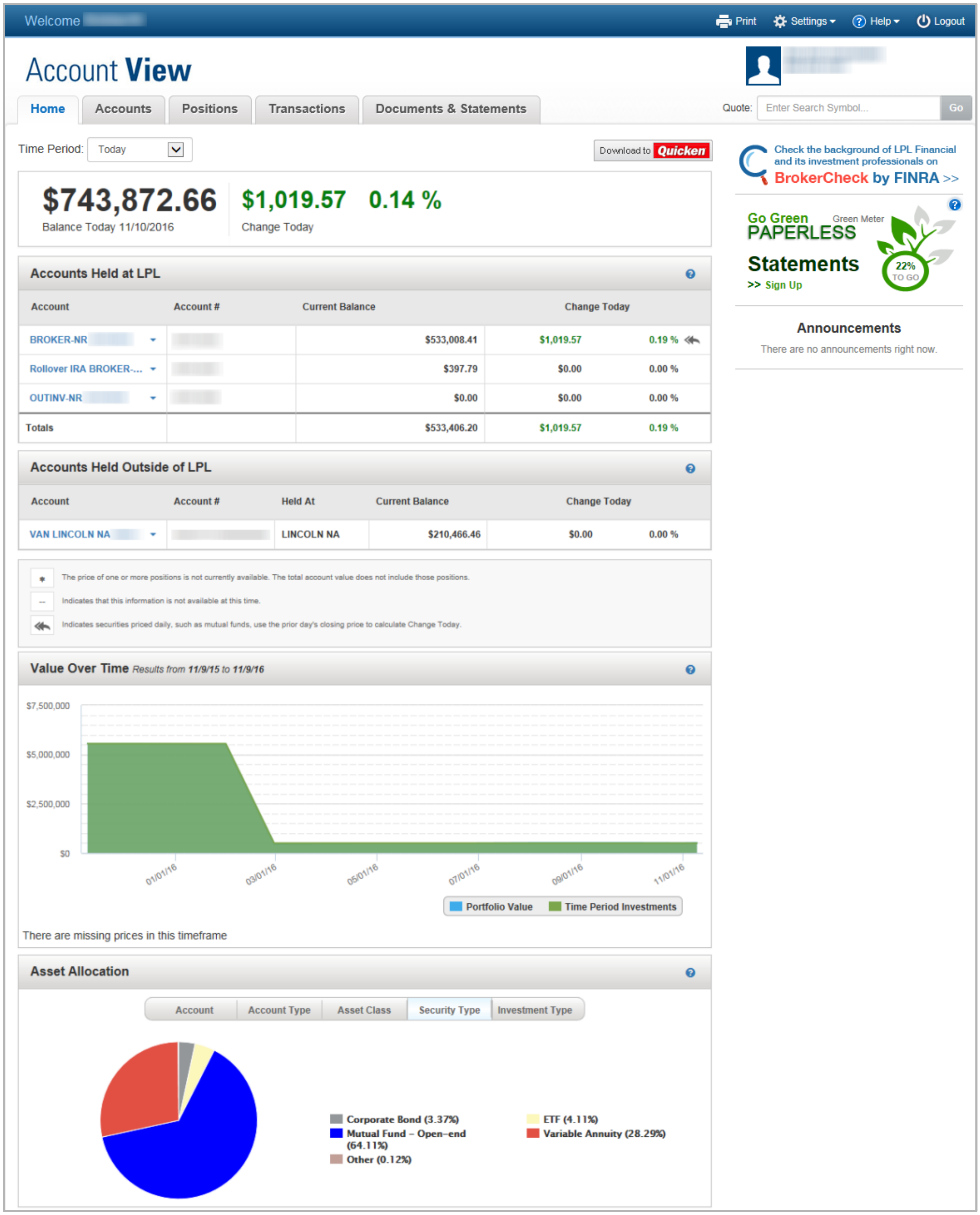
Account View Homepage

You will be directed to your Account View homepage where you can begin viewing your account details, statements, and much more!



Please see the Account View brochure for instructions on customizing your settings and resetting your password.