

# 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](mailto:noreply.myaccountviewonline@lpl.com). Adding [noreply.myaccountviewonline@lpl.com](mailto: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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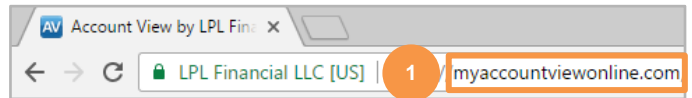
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# Account View Getting Started User Guide

## Access Account View

1. Access Account View through your Financial Advisor's website or directly at: [myaccountviewonline.com](http://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**.

**Account View**

**Login**

Username

Password

[Trouble logging in?](#)

**Log In**

**First Time User?**  
Create an account now: **Sign Up for 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 **3**

\*Account Number

\*Zip or Postal Code **4**

**Cancel** **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**.

**Create User Name and Password**

**Create User Name**  
\*User Name  
 **1** **Test Availability**

**Create User Name and Password**

**Create User Name**  
\*User Name  
 **2** **Test Availability**

# Account View Getting Started User Guide

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

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

\*New Password

\*Confirm Password

Cancel Continue

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

**Contact Information**

\* First Name: Middle Name: \* Last Name:

\* Social Security or Tax ID Number: SSN Tax ID

Phone Number: Mobile Number:

\* Email \* Confirm Email


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

**Manage Accounts**

Account Number	SSN or Tax ID
----------------	---------------

+ 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**.

**Manage Accounts**

Account Number	Zip Code	*Nickname
01945	01945	BROKER-NR

+ Add Account

Cancel Continue

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

**Verify Information**

**Contact Information**

First Name: **Josh** Middle Name: Last Name: **Test**

Phone Number: Mobile Number:

Email: User Name:

**Associated Accounts**

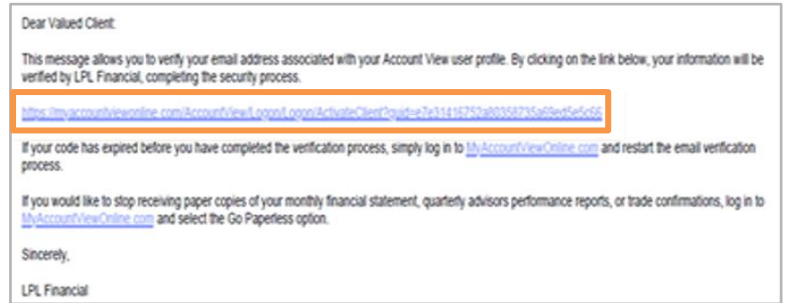
Account #	Zip Code	Nickname
	92121	

Create Profile

# Account View Getting Started User Guide

## Retrieve Email

Go to your email and open the message from: [noreply.myaccountviewonline@lpl.com](mailto: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**.

Complete Site Registration

Please enter your Username

Please enter your Password

1

2 Continue

Site Terms and Conditions

**ACCOUNT VIEW AUTHORIZATION AND TERMS OF USE**

Account View is the easy and effective on-line access to your account information. From within Account View you can view your account balances, positions and transactions.

As a condition to activating Account View services, please read the following and indicate your acceptance below. By indicating acceptance, you agree to follow Account View's Terms of Use and hereby understand, acknowledge and agree:

**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.

3

Disagree 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.

Welcome

**We invite you to sign up for paperless statements**

- Convenient
- Secure
- Consolidated



**Go Paperless**

**You are 0% green. Enjoy the convenience of paperless statements and go 100% green now.**

Not Now

# Account View Getting Started User Guide

## Account View Homepage

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

The screenshot displays the Account View homepage with the following sections:

- Header:** Welcome [User Name], Print, Settings, Help, Logout.
- Account View:** Home, Accounts, Positions, Transactions, Documents & Statements. Search bar: Enter Search Symbol... Go.
- Summary:**
  - Balance Today 11/10/2016: **\$743,872.66**
  - Change Today: **\$1,019.57** (0.14%)
- Accounts Held at LPL:**

Account	Account #	Current Balance	Change Today
BROKER-NR		\$533,008.41	\$1,019.57 (0.19%)
Rollover IRA BROKER...		\$397.79	\$0.00 (0.00%)
OUTINV-NR		\$0.00	\$0.00 (0.00%)
<b>Totals</b>		<b>\$533,406.20</b>	<b>\$1,019.57</b> (0.19%)
- Accounts Held Outside of LPL:**

Account	Account #	Held At	Current Balance	Change Today
VAN LINCOLN NA		LINCOLN NA	\$210,466.46	\$0.00 (0.00%)
- Value Over Time:** Results from 11/9/15 to 11/9/16. A line chart showing Portfolio Value (blue) and Time Period Investments (green) over time. The chart shows a sharp drop in value around 03/01/16.
- Asset Allocation:** A pie chart showing the distribution of assets:
  - Variable Annuity (28.29%)
  - Mutual Fund - Open-end (64.11%)
  - ETF (4.11%)
  - Corporate Bond (3.37%)
  - Other (0.12%)



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