

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



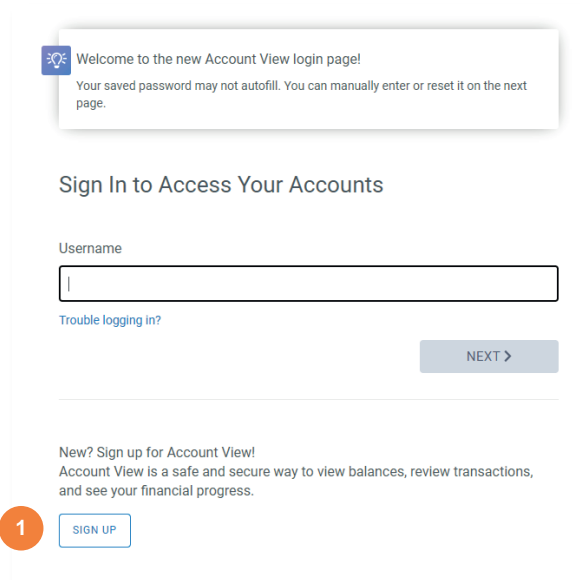
Frequently Asked Questions

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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.

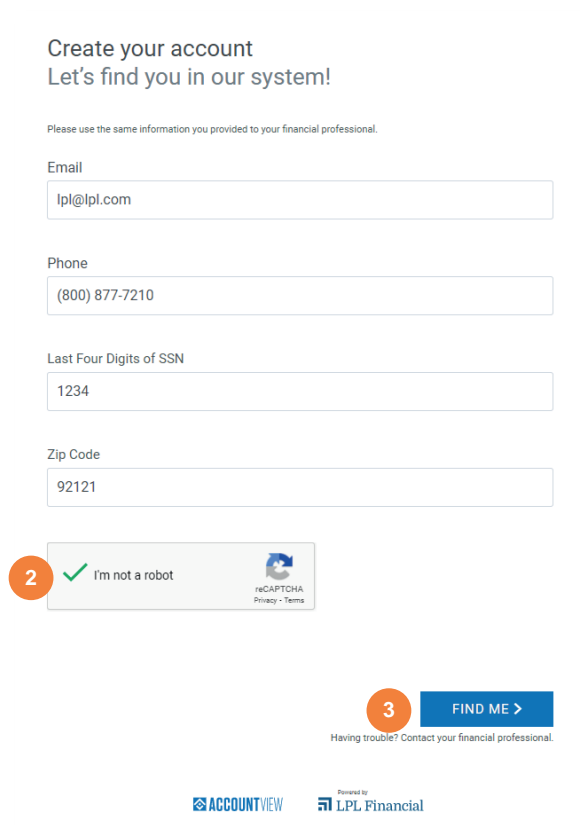
1 SIGN UP

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



Enter your **Phone** number and your residential **Zip Code**. 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

Phone

Last Four Digits of SSN

Zip Code

2  I'm not a robot [Privacy](#) [Terms](#)

3 FIND ME >

[Having trouble? Contact your financial professional.](#)

ACCOUNTVIEW Powered by LPL Financial

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

Terms and Conditions:

Please read our terms and conditions and hit the "Agree" button to activate your account.

TERMS OF USE FOR ONLINE SERVICES

IMPORTANT - READ CAREFULLY:

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BY CLICKING ON THE ACCEPT BUTTON, YOU HEREBY ACCEPT THIS AGREEMENT AND AGREE THAT YOU ARE LEGALLY BOUND BY ITS TERMS AND CONDITIONS. IF YOU DO NOT AGREE TO ALL OF THE TERMS AND CONDITIONS OF THIS AGREEMENT, LPL WILL NOT AND DOES NOT MAKE AVAILABLE THE ONLINE SERVICES TO YOU. YOU ARE NOT AUTHORIZED TO ACCESS OR USE THE ONLINE SERVICES, AND YOU SHOULD CLICK ON THE DO NOT ACCEPT BUTTON.

1. Right to Access and Use the Online Services. Subject to and conditioned upon your compliance with all the terms and conditions set forth herein, LPL hereby grants to you a limited, revocable, non-transferable right to access and use the Online Services for your personal, non-commercial use.

2. Consent to Electronic Delivery of Account Communications. You hereby authorize LPL to deliver documents, correspondence and other communications (Communications) including, account statements, performance reports, regulatory and other notices in connection with your LPL account to this e-mail address or mobile telephone number in the event of your agreement to electronic delivery of communications.

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

Set Password

Enter 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:

✔ At least one upper case letter

✔ At least one lower case letter

✔ At least one number

✔ At least one special character - @!%&'*+~(){}[]^_<>|:;.,~

Confirm Password


5

CONFIRM >

Reset

Cancel

6. Login with your new credentials.



Congrats, you're all set up with Account View!

Sign in with your credentials to get started. Your username is the email address you signed up with.


Sign In to Access Your Accounts

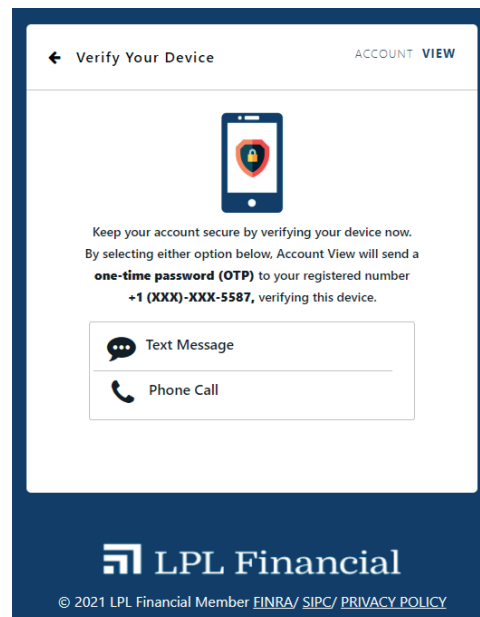
Username

[Trouble logging in?](#)

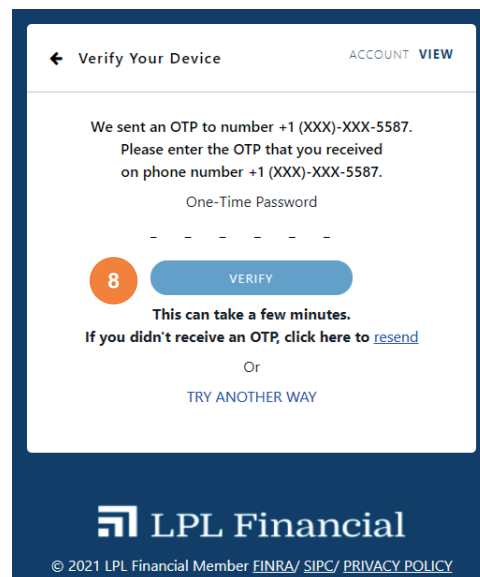
NEXT >

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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Bank/Credit Union Deposits or Obligations | May Lose Value

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