

Account View

Getting Started User Guide

Introduction

This User Guide will walk you through how 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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Account View

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Access Account View

1. Access Account View through your Financial Advisor's website, or directly, at:
www.myaccountviewonline.com.
2. Create an account by clicking **Sign Up for Account View**.



Account View

Login

Username

Password

[Trouble logging in?](#)

Log In

First Time User?

Create an account now:

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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**.

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

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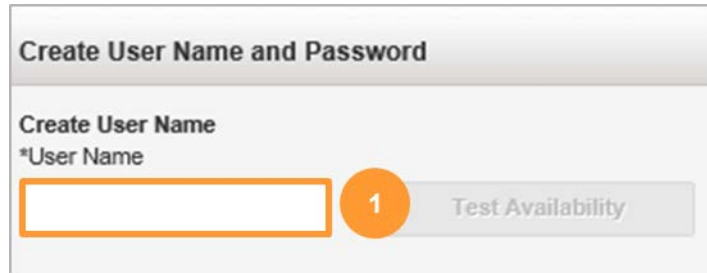
Continue

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Create Your Profile

1. Create your **User Name**.



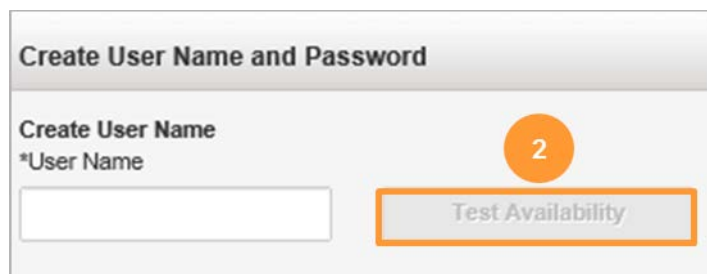
Create User Name and Password

Create User Name

*User Name

1 Test Availability

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



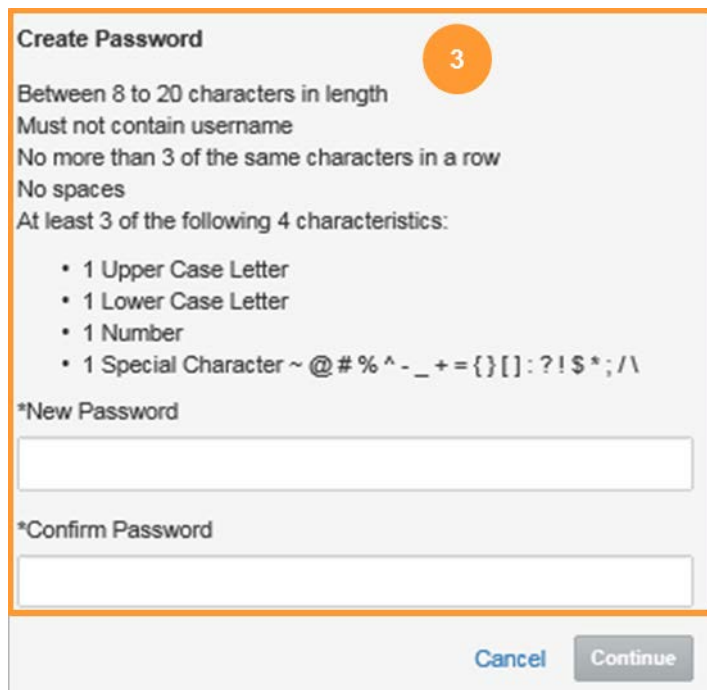
Create User Name and Password

Create User Name

*User Name

2 Test Availability

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



Create Password

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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

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4. Click **Continue**.

*New Password

*Confirm Password

Cancel Continue

5. Fill in your **Contact Information**.

Contact Information

*First Name: Middle Name: *Last Name:

Phone Number: Mobile Number:

*Email: *Confirm Email:

Manage Accounts

Account Number	Zip Code	*Nickname	Delete
3396-1000	01945	BROKER-NR 33961000	<input type="checkbox"/>

+ Add Account

Cancel Continue

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.

Manage Accounts

Account Number	Zip Code	*Nickname	Delete
3396-1000			<input type="checkbox"/>

+ Add Account

Cancel Continue

 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	Delete
3396-1000	01945	BROKER-NR 33961000	<input type="checkbox"/>

+ Add Account

Cancel Continue

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9. Click **Create Profile**.

Verify Information

Contact Information			
First Name:	Josh	Middle Name:	Last Name: Test
Phone Number:		Mobile Number:	
Email:		User Name:	

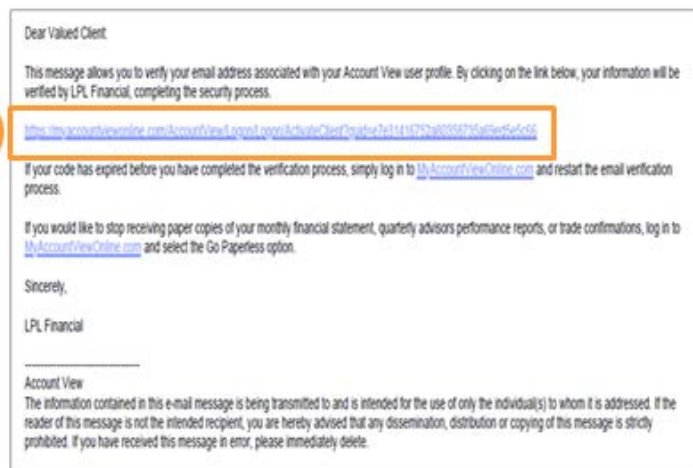
Associated Accounts			
Account #	Zip Code	92121	Nickname

9 **Create Profile**

Retrieve Email

1. 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.

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Validate User Information

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

Complete Site Registration

Please enter your Username

Please enter your Password

1

2 Continue

3. Agree to the site Terms and Conditions by selecting Agree.

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.

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

Welcome

We invite you to sign up for paperless statements

- Convenient
- Secure
- Consolidated

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

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!

Account View

Home Accounts Positions Transactions Statements

Time Period: All 13 Months Results from 7/21/2015 to 7/21/2016 Download Quickset

\$5,841,483.16*

Balance on 7/21/2016

Accounts Held at LPL Show Fewer Accounts					
Account	Account #	Balance on 7/21/2015	Deposits & Withdrawals	Investment Returns	Balance on 7/21/2016
M&S INV 22100100	-	\$166,696.26	\$0.00	\$3,246,736.31	\$3,413,432.57
PWTFNS 20962308	-	\$78,611.71	-\$46.62	-\$653,777.64	\$724,344.33
AUCMP INV 24795316	-	\$52,518.00	\$6,000.00	-\$675,384.62	\$721,963.38
_PWTFNS 20917228	-	\$21,647.63	\$2,658.62	-\$866,336.74	\$884,379.75
AUCMP INV 66002917	-	\$43,696.68	\$0.00	\$0.00	\$43,696.68
BRUCKER INV 17000843a	-	\$555.20	\$0.00	\$0.00	\$555.20
Totals		\$356,664.88	-\$6,706.64	-\$5,156,269.71	\$5,482,267.58

Accounts Held Outside of LPL			
Account	Account #	Held At	Balance on 7/21/2016
BRUCKER INV 17000843	-	JACKSON NA	\$356,215.61

* The price of one or more positions is not currently available. The total account value does not include these positions.
 - Indicates that the information is not available for this line.
 Includes securities owned by both an individual family unit and other funds, even the same stock, unless you've selected "Change Terms".

Value Over Time

\$7,000,000



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