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

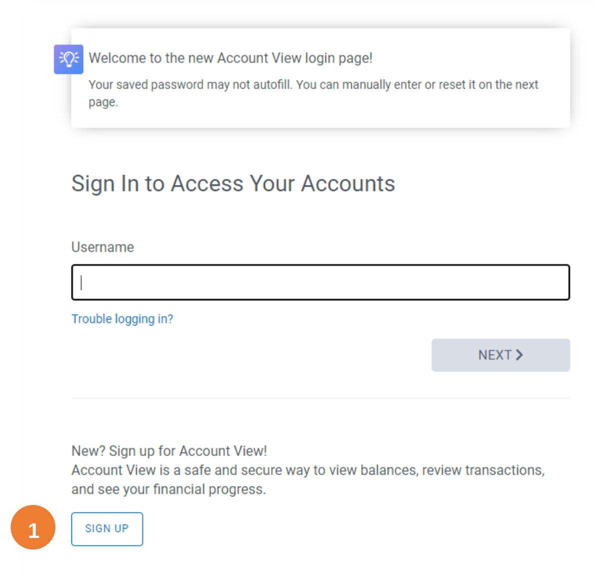
Information or Note

Frequently Asked Questions

Contents

Signing Up for Account View 2.0

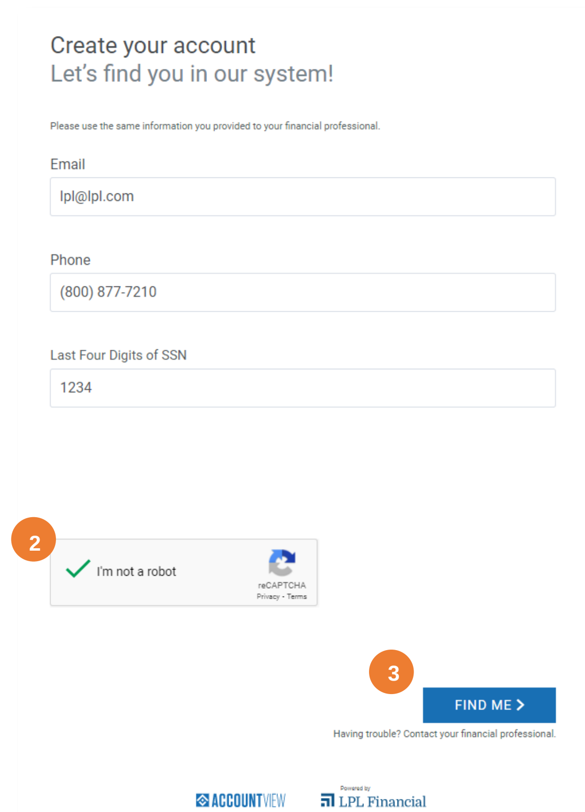
1. Go to https://myaccountviewonline.com/login/. Select **Sign Up**.



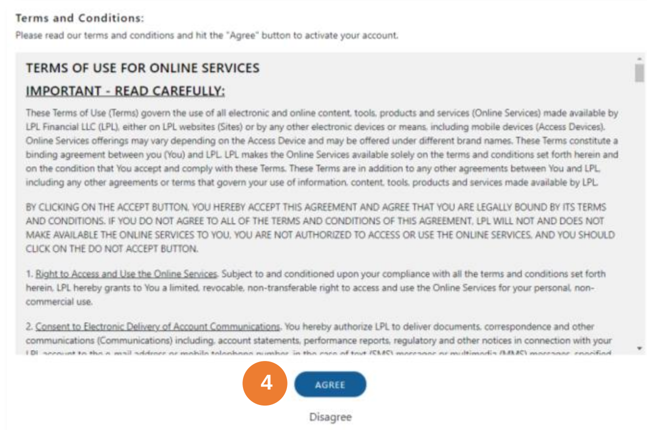
2. Enter your email, phone, and last four digits of SSN that you provided to your financial professional. Then complete the **reCAPTCHA**. All fields are required.

Enter your **Mobile Phone**. If you have difficulty creating your profile, please contact your financial professional.

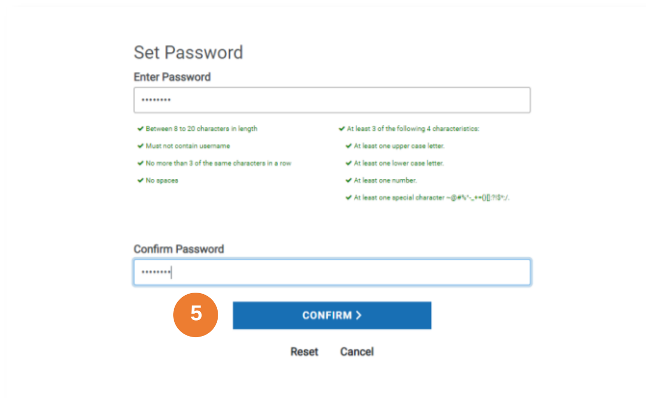
3. Select **Find Me** to continue.



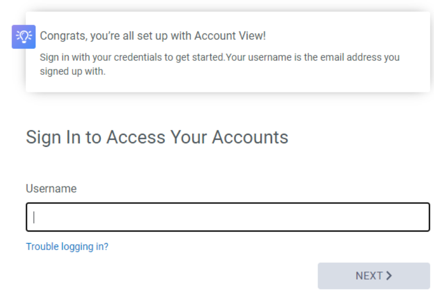
4. Review and **Agree** to the **Terms and Conditions**.



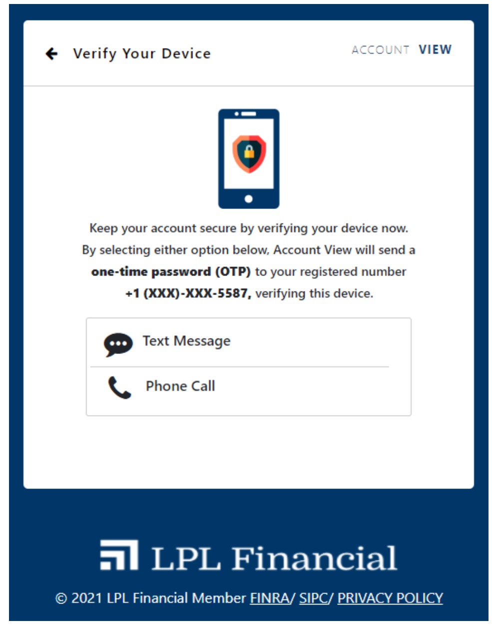
5. Create and **Confirm** your password.



6. Login with your new credentials.

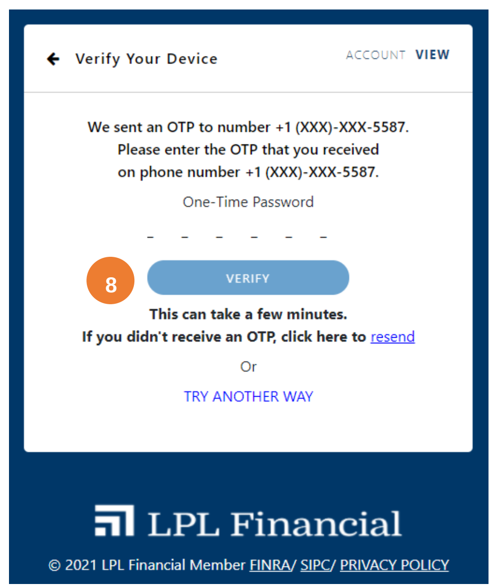


7. Select your verification method using your device to receive the **one-time password (OTP)** sent to your registered phone number.



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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