

Setting up Account View 2.0



1. Visit the website <https://myaccountviewonline.com/login/>
2. Select **Sign Up** to continue

New? Sign up for Account View!
Account View is a safe and secure way to view balances, review transactions, and see your financial progress.

SIGN UP

Important Note: Account View 2.0 is brand new and completely unrelated to your previous Waddell & Reed account; your login information and password from your previous account will not work for this account

3. Enter your E-mail Address, Phone Number and the last 4 digits of your Social Security Number and select **Find Me**

Important Note: If you receive an error notice stating: *"Your request does not match our records. Please contact your financial professional to complete registration."*, it is most likely the case that either the e-mail address or phone number is listed as something else in our system. E-mail Emma at esims@mavenlanefinancial.com with the e-mail address and phone number you would like to use, and we will update the information.

4. Create your account password, fulfilling the listed requirements
5. Review and agree to the terms and conditions
6. Login using your new credentials

Important Note: Your User ID will always be your e-mail address.

7. Complete the phone verification steps and enjoy your new online access!

*For more information on Account View 2.0, visit our website at www.mavenlanefinancialgroup.com and select **Online Access > Account View 2.0** for helpful brochures, frequently asked questions, and even a video guide!*