

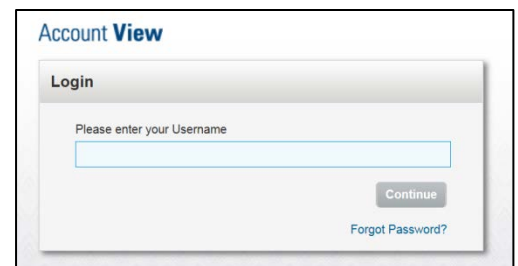
# Account View

## One-Time Verification Process

### Before getting started:

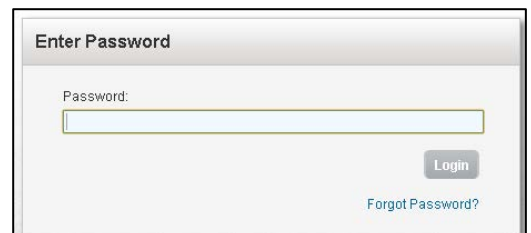
- This one-time verification process must be done on a desktop computer, not on your mobile device. Once you have completed the verification process you can begin accessing Account View from your mobile device.
- You should have your email open to retrieve a verification message that will be sent from **noreply.myaccountviewonline@lpl.com**
- Adding noreply.myaccountviewonline@lpl.com to your contacts or address book will ensure receipt of the verification message
- An LPL account number will be required to validate your identity

**Step 1:** Access the new Account View through your Financial Advisor’s website, or directly, at: [www.myaccountviewonline.com](http://www.myaccountviewonline.com)



**Step 2:** Enter your existing Username and select **Continue**

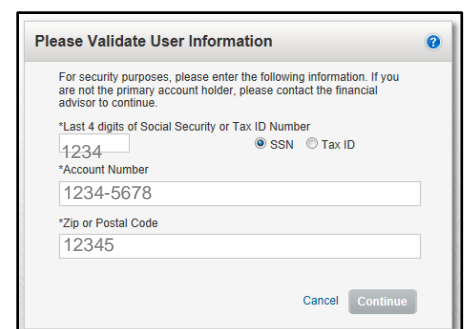
**Step 3:** Enter your existing Password and select **Login**



**Step 4:** A Welcome message will appear providing you with additional steps.

Select **Continue**.

**Step 5:** Enter the last 4 digits of your social security number or tax ID number, any one of your LPL account numbers with dashes (for example XXXX-XXXX), and zip code. Select **Continue**



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**Step 6:** Update your profile information, choose a new password, and select a security image

Review your listed account(s). To add an additional account select [Add Account](#), enter the Account Number with dashes (for example XXXX-XXXX) and Nickname to refer to the account.

*If you are unable to add an account to your profile, please contact your Advisor.*

When you are ready to proceed, select [Continue](#)

Account Number	Postal / Zip Code	* Nickname	Delete
<input type="text"/>	<input type="text"/>	IRA	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	JOINT	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	INDIVIDUAL	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	Roth IRA	<input type="checkbox"/>

**Step 7:** Verify the information you have entered in your profile and select [Create Profile](#)

**Step 8:** Confirmation will appear, letting you know that your profile has been created.

Select [OK](#) and close your browser window.

Account #	Zip/Postal Code	Nickname
<input type="text"/>	20108	abo de5
<input type="text"/>	20108	SARMI-RET
<input type="text"/>	20108	SARA-RET
<input type="text"/>	20108	abo de9

# Account View

## One-Time Verification Process

**Step 9:** Go to your email and open the message from: **noreply.myaccountviewonline@lpl.com**

Select the first link within the email.



Dear Valued Client:

This message allows you to verify your email address associated with your **Account View** user profile. By clicking on the link below, your information will be verified by LPL Financial, completing the security process.

<https://myaccountviewonline.com/AccountView/Logon/Logon/ActivateClient?guid=27b9a1a67fd8db3fc4d8a3f661d5e2>


If your code has expired before you have completed the verification process, simply log in to [MyAccountViewOnline.com](https://MyAccountViewOnline.com) and restart the email verification process.

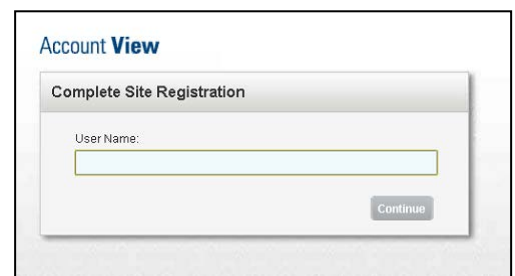
If you would like to stop receiving paper copies of your monthly financial statement, quarterly advisors performance reports, or trade confirmations, log in to [MyAccountViewOnline.com](https://MyAccountViewOnline.com) and select the **Go Paperless** option.

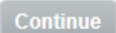
Sincerely,

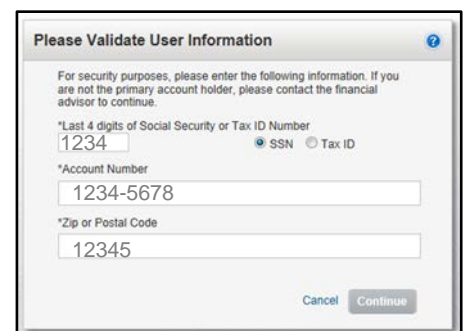
LPL Financial

**Step 10:** You will be presented with the Account View login screen.

Enter your Username and select 




**Step 11:** Complete the one-time verification process by entering the last 4 digits of your Social Security or Tax ID Number, any one of your LPL account numbers with dashes and your Zip Code. Select 




# Account View

## One-Time Verification Process


**Step 12:** Agree to the site Terms and Conditions by selecting 

*Note: If you have previously selected to go paperless for any of your statements you will also be asked to agree to the Electronic Terms and Conditions*

**Step 13:** You can eliminate mailings and enjoy online access of your statements and trade confirmations by selecting 

*Note: If you are already 100% paperless, this message will not appear*

**Step 14:** Watch the **Demo Tour** video to learn more about the many benefits and features of Account View.

Select  to continue on to Account View.

**Step 15:** You will be directed to your Account View homepage where you can begin viewing your account details, statements, market news, and much more!

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

