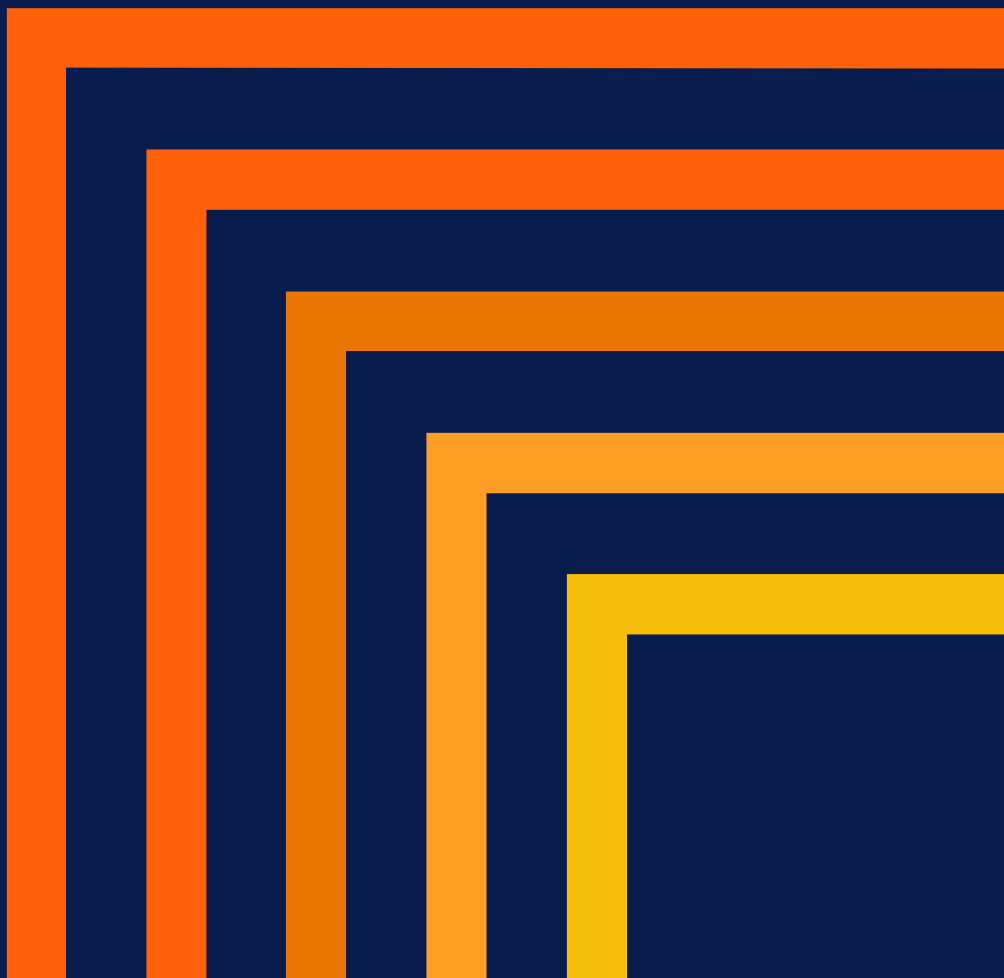


ACCESS YOUR LPL ACCOUNT

Account View Setup Instructions



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
I

[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.

[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.

Create your account

Let's find you in our system!

Please use the same information you provided to your financial professional.

Email
lpl@lpl.com

Phone
(800) 877-7210

Last Four Digits of SSN
1234

[I'm not a robot](#)

[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:

These Terms of Use (Terms) govern the use of all electronic and online content, tools, products and services (Online Services) made available by LPL Financial LLC (LPL) either on LPL websites (Sites) or by any other electronic devices or means, including mobile devices (Access Devices). Online Services offerings may vary depending on the Access Device and may be offered under different brand names. These Terms constitute a binding agreement between you (You) and LPL. LPL makes the Online Services available solely on the terms and conditions set forth herein and on the condition that you accept and comply with these Terms. These Terms are in addition to any other agreements between You and LPL, including any other agreements or terms that govern your use of information, content, tools, products and services made available by LPL.

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 the e-mail address or mobile telephone number in the case of text (SMS) messages or multimedia (MMS) messages provided

4

AGREE

Disagree

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 >

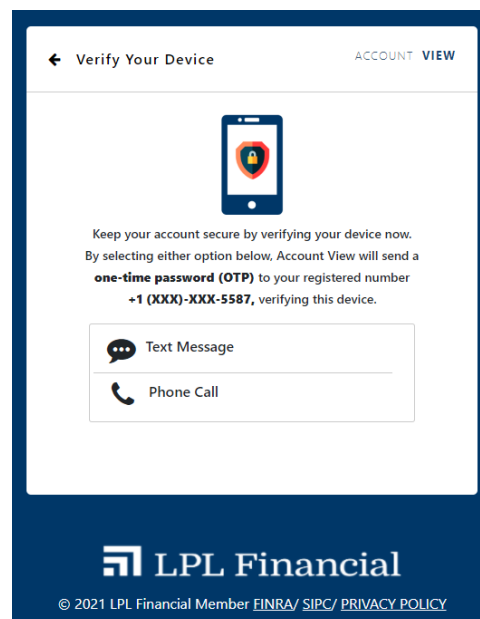
Reset

Cancel

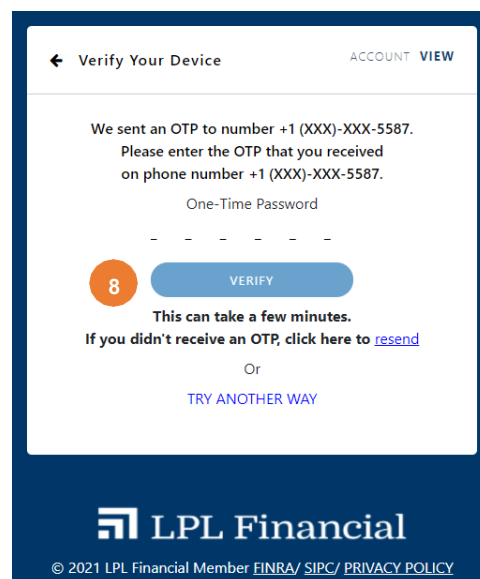
6. Login with your new credentials.

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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Not Insured by FDIC/NCUA or Any Other Government Agency	Not Bank/Credit Union Guaranteed	Not Bank/Credit Union Deposits or Obligations	May Lose Value
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