LPL FINANCIAL

Account View

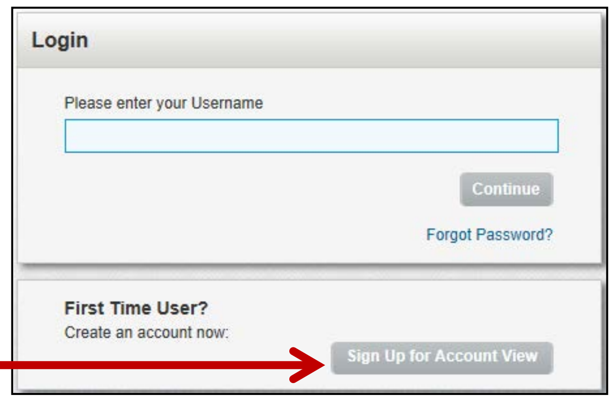
Getting Started

Before getting started:

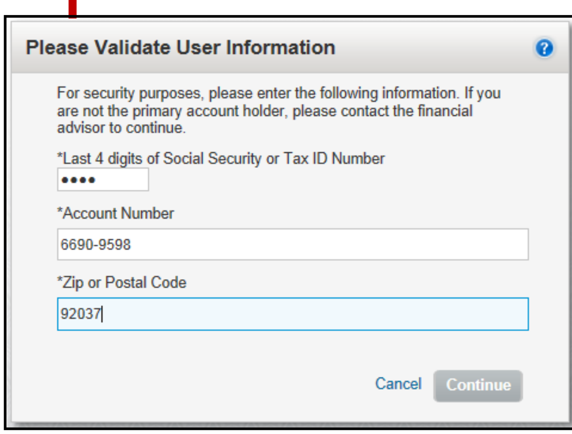
- The first time you access Account View, you will need to use your desktop computer. Going forward, you can access Account View from your mobile device(s).
- You should have your email open to retrieve a verification message that will be sent from noreply.myaccountviewonline@lpl.com.
- Adding noreply.myaccountviewonline@lpl.com to your contacts or address book will ensure receipt of the verification message.
- An LPL account number will be required to validate your identity.

1 Access Account View through your Financial Advisor's website, or directly, at: www.myaccountviewonline.com

2 Create an account by selecting Sign Up for Account View.



3 Enter the last 4 digits of your social security number or tax ID number, any one of your LPL account numbers and zip code.

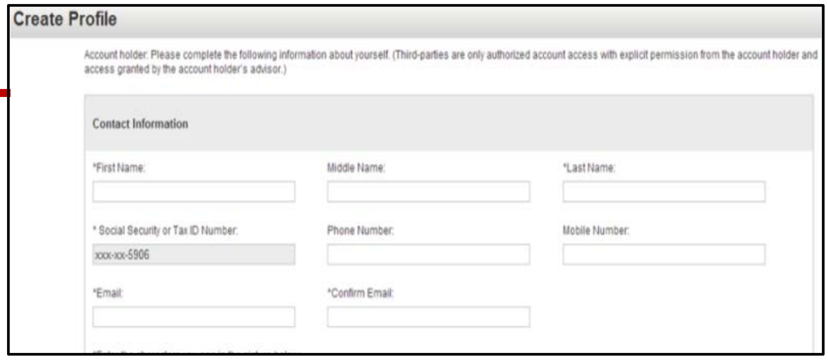


Once you have entered in your information, select **Continue**.

4

Create your profile by adding the required information- first name, last name, email address, confirm email address and either type in a username or check the “use email as username” checkbox.

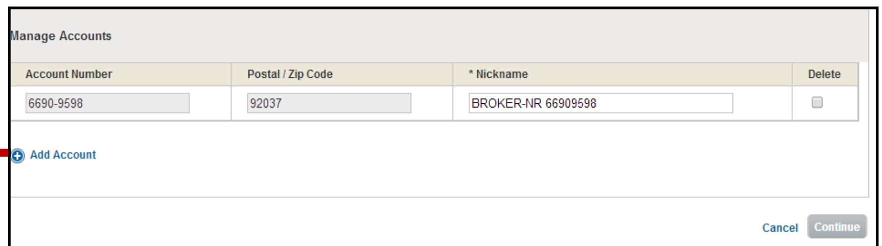
Select your preferred contact method.



To add accounts, select **+Add Account**

In the blank fields, enter the Account Number and the nickname of the account.

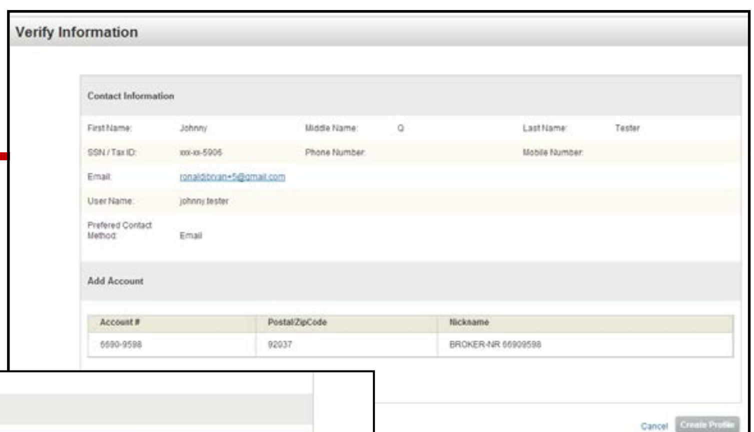
If you are unable to add an account to your profile, please contact your Advisor.

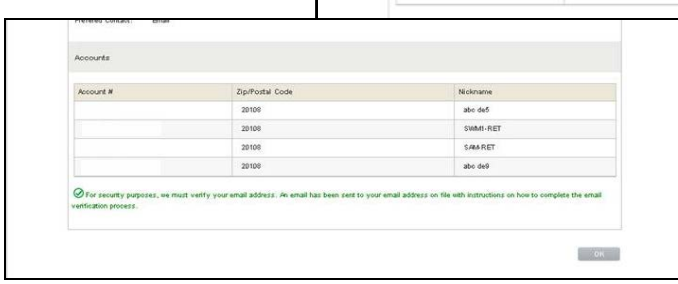


Once you have entered in your account(s), select **Continue**.

5

Verify your information and select **Create Profile**.





Select **OK** and close your browser window.

6

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

Select the *first* link in 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=27b9a1a67fd8db3fc7c4d8a3f661d5e2.

If your code has expired before you have completed the verification process, simply log in to 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 and select the **Go Paperless** option.

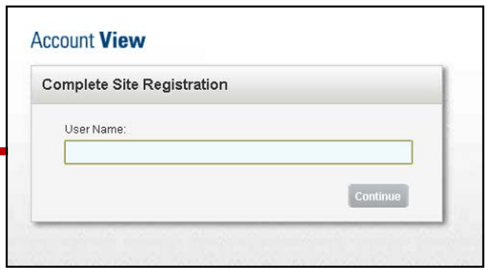
Sincerely,

LPL Financial

7

You will be presented with the Account View login screen.

Enter your Username and select **Continue**.



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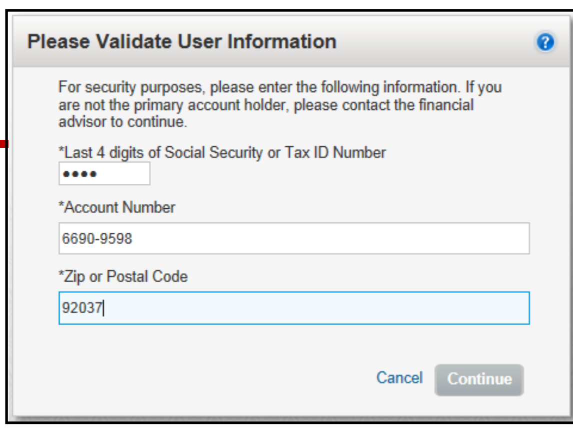
Enter the last 4 digits of your social security number or tax ID number, any one of your LPL account numbers with dashes (for example: XXXX-XXXX) and your zip code.

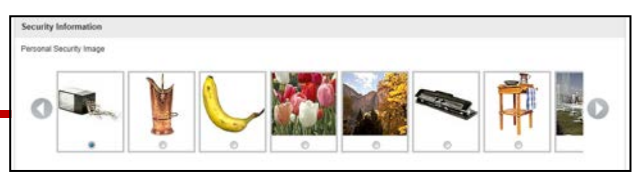


Once you have entered your information, select **Continue**.

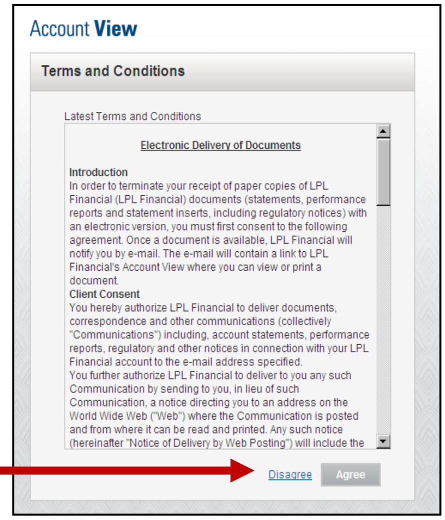
9

The system displays a screen to set your site key and password. Select a personal security image and set your password.

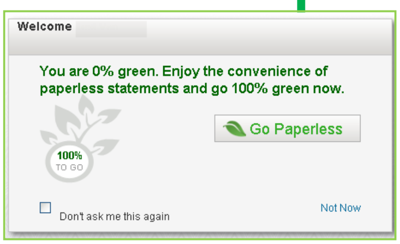
Then, click **Submit**.



10 Agree to the site Terms and Conditions by selecting **Agree**.



11 You can eliminate mailings and enjoy online access of your statements and trade confirmations by selecting **Go Paperless**.



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

Select **Close** to continue on to Account View.

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