

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 <u>noreply.myaccountviewonline@lpl.com</u> to your contacts or address book will ensure receipt of the verification message.
- An LPL account number will be required to validate your identity.





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.

Account holder: Prease complete the following information about yourself. (Third-parties are only authorized account access with explicit permission from the account access granted by the account holder's advisor.)						
Contact Information						
*First Name:	Middle Name:	*Last Name:				
* Social Security or Tax ID Number:	Phone Number:	Mobile Number:				
ххх-хх-5906						
*Email:	*Confirm Email:					

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.

			Account Number	Postal / Zip Code		* Nickname		Delete
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Then, click Submit.





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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.



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.