LPL FINANCIAL

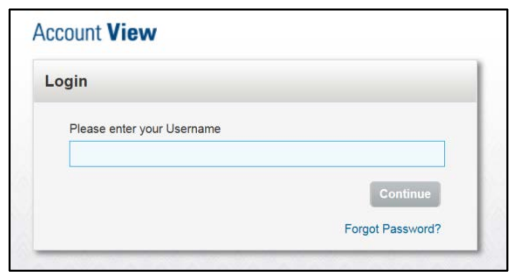
Account View

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

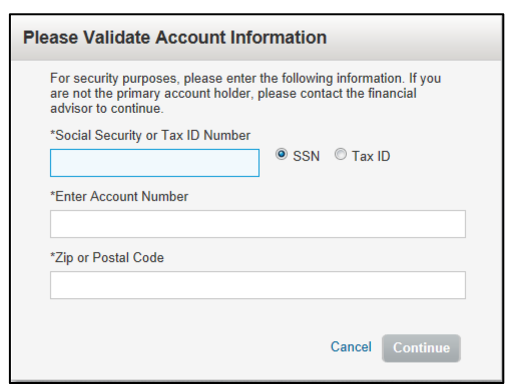


Step 2: Enter your existing Username and select Continue

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 your social security number or tax ID number, any one of your LPL account numbers, and zip code and select Continue

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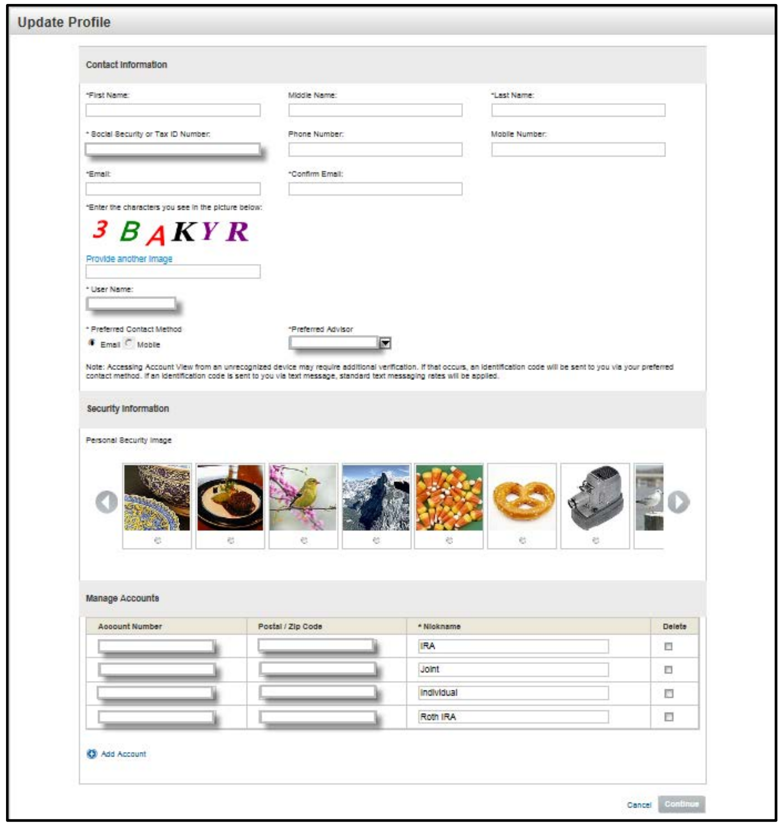
Step 6: Update your profile information, choose a new password, and select a security image

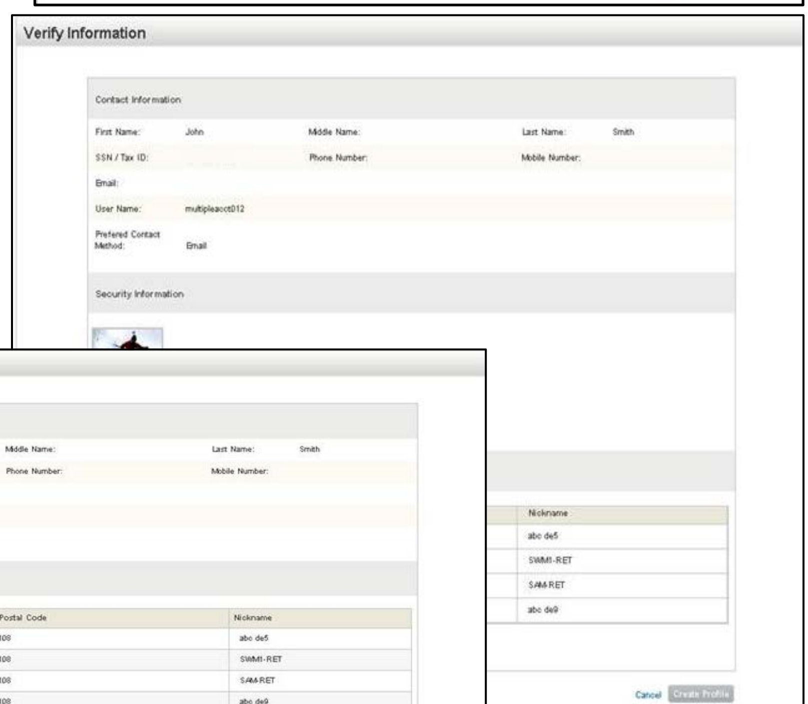
Review your listed account(s). To add an additional account select Add Account , enter the Account Number and Nickname to refer to the account.

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

When you are ready to proceed, select Continue

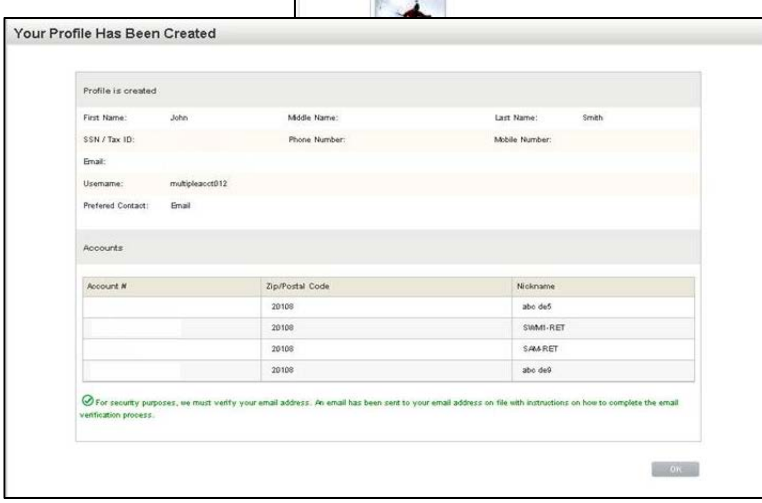


Step 7: Verify the information you have entered in your profile and select Create Profile



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

Select OK and close your browser window.



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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=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,

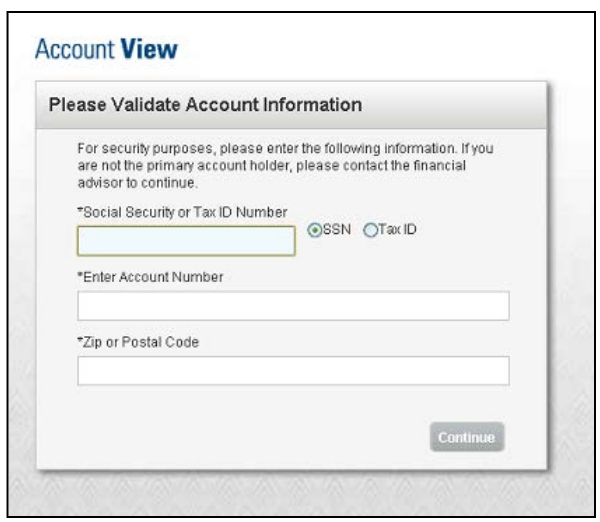
LPL Financial

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

Enter your Username and select Continue

Step 11: Complete the one-time verification process by entering your Social Security or Tax ID Number, any one of your LPL Account Numbers, and your Zip Code.

Select Continue



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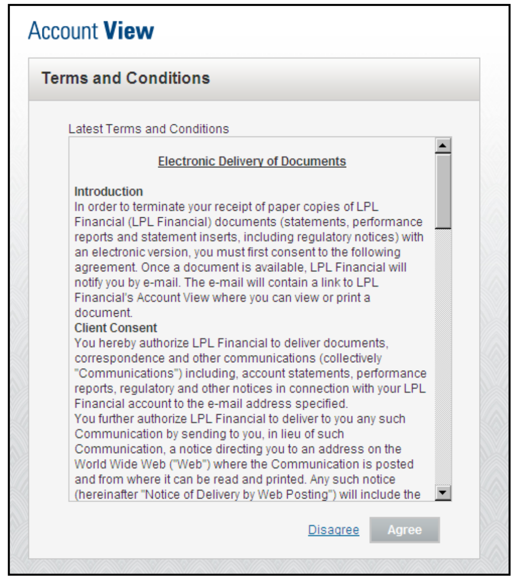
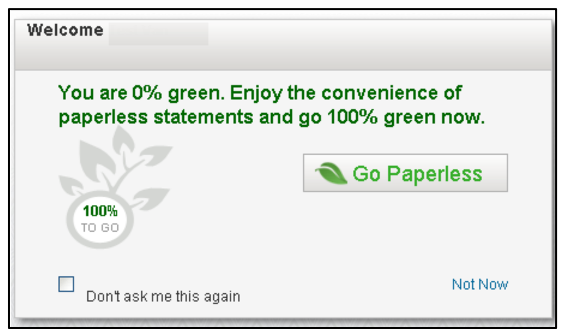
Step 12: Agree to the site Terms and Conditions by selecting Agree



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 Go Paperless



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 Close 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.