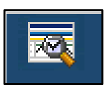
Account View

How to Create a Profile

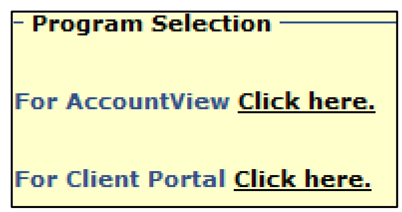
Your clients have the ability to create their own Account View profiles, or you can start the process for them.

If you would like your client to create their own profile please provide them with the Account View Client Brochure, or the Getting Started with Account View PDF, which can be found in BranchNet | Resource Center | Support | Technology | Account View Reference Center.

Follow the instructions below to do the initial set-up of a client profile. Your client will need to complete the process to activate their profile.

Step 1: Access Account View by logging into BranchNet and selecting the magnifying glass icon in the upper right corner of the screen 

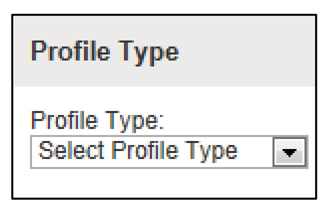
Step 2: Under Program Selection select the option for Account View



Step 3: Select 

from your Account View home screen

Step 4: Select **Client**, **Foreign Account** or **Interested Third Party** from the Profile Type dropdown



Foreign Account Profile – Will not require a SSN and will not allow the client to go paperless on those accounts associated

Interested Third Party Profile –Social Security Numbers will be suppressed from the third parties' access.

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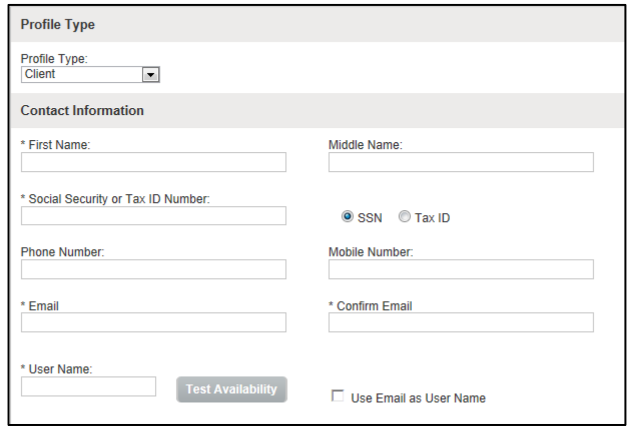
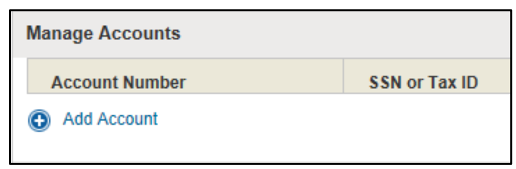
Step 5: Enter the required information: First Name, Last Name, Social Security or Tax ID Number, Email, and User Name (the client's email address can be used as their User Name)



Select **Test Availability** to confirm the User Name is available

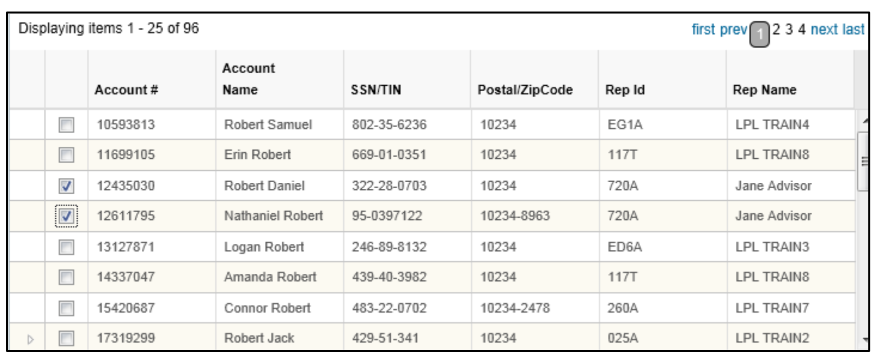
Step 6: To add accounts to the Client Profile select **Add Account** within the Manage Accounts section of the screen.



Search for the account(s) you would like to add by rep id, Account Name, Account Number, SSN or Zip Code.

Select **Search**

Check off the account(s) you would like to add and then **Select Accounts**


Displaying items 1 - 25 of 96 first prev 1 2 3 4 next last

	Account #	Account Name	SSN/TIN	Postal/ZipCode	Rep Id	Rep Name
☐	10593813	Robert Samuel	802-35-6236	10234	EG1A	LPL TRAIN4
☐	11699105	Erin Robert	669-01-0351	10234	117T	LPL TRAIN8
☑	12435030	Robert Daniel	322-28-0703	10234	720A	Jane Advisor
☑	12611795	Nathaniel Robert	95-0397122	10234-8963	720A	Jane Advisor
☐	13127871	Logan Robert	246-89-8132	10234	ED6A	LPL TRAIN3
☐	14337047	Amanda Robert	439-40-3982	10234	117T	LPL TRAIN8
☐	15420687	Connor Robert	483-22-0702	10234-2478	260A	LPL TRAIN7
☐	17319299	Robert Jack	429-51-341	10234	025A	LPL TRAIN2

Back on the Create Profile screen select **Proceed**

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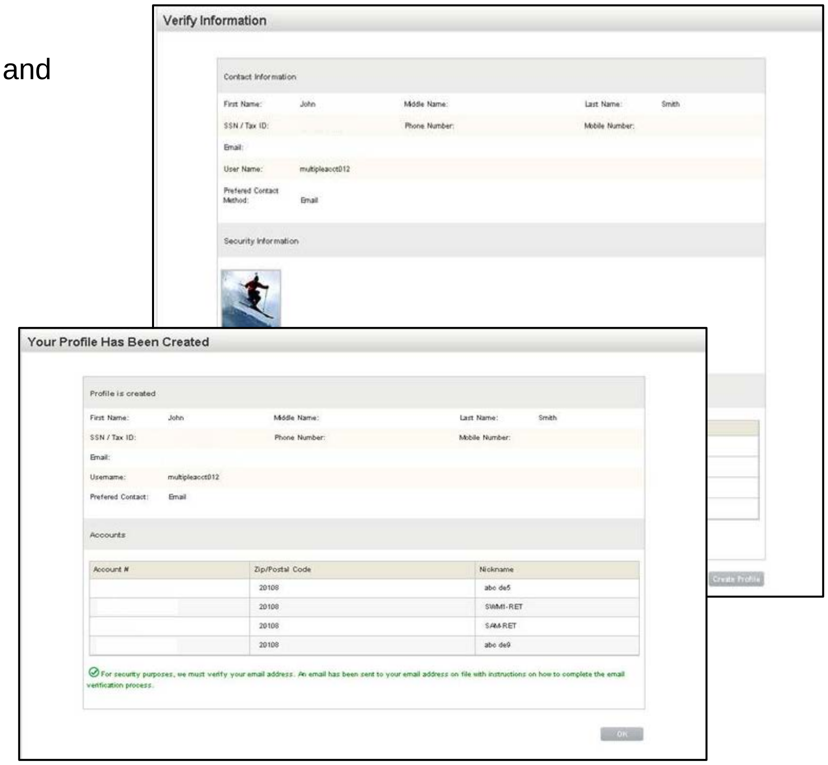
Step 7: Verify the information you have entered and select **Create Profile**

Select **OK**



Step 8: Your client will receive an email from **noreply.myaccountviewonline@lpl.com** to complete the process

To attend a live training where we will discuss branding Account View, visit BranchNet | Reference Center | Support | Technology | Account View Reference Center.

For questions or issues related to Account View functionality or access contact the Technical Support Desk at x6357. Select Option 2 for the new Account View.