

# 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.

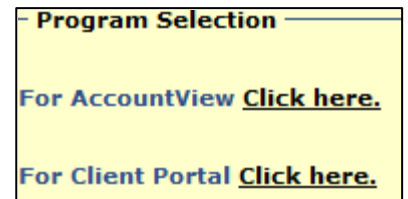
If you would like your client to create their own profile please provide them with the Account View Client Brochure, or the Getting Started with Account View PDF, which can be found in BranchNet | Resource Center | Support | Technology | Account View Reference Center.

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

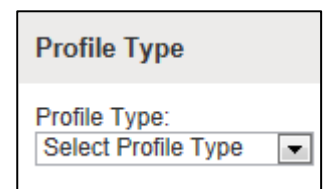


**Step 2:** Under Program Selection select the option for Account View



**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

The form is titled "Profile Type" and has a dropdown menu set to "Client". Below this is the "Contact Information" section with the following fields:

- \* First Name: [text input]
- Middle Name: [text input]
- \* Social Security or Tax ID Number: [text input]
- SSN (selected) / Tax ID (radio button)
- Phone Number: [text input]
- Mobile Number: [text input]
- \* Email: [text input]
- \* Confirm Email: [text input]
- \* User Name: [text input]
- Test Availability (button)
- Use Email as User Name

**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.

The "Manage Accounts" section contains a table with columns for "Account Number" and "SSN or Tax ID". Below the table is a blue button with a plus icon and the text "Add Account".

Select **Search**

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

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

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
<input type="checkbox"/>	10593813	Robert Samuel	802-35-6236	10234	EG1A	LPL TRAIN4
<input type="checkbox"/>	11699105	Erin Robert	669-01-0351	10234	117T	LPL TRAIN8
<input checked="" type="checkbox"/>	12435030	Robert Daniel	322-28-0703	10234	720A	Jane Advisor
<input checked="" type="checkbox"/>	12611795	Nathaniel Robert	95-0397122	10234-8963	720A	Jane Advisor
<input type="checkbox"/>	13127871	Logan Robert	246-89-8132	10234	ED6A	LPL TRAIN3
<input type="checkbox"/>	14337047	Amanda Robert	439-40-3982	10234	117T	LPL TRAIN8
<input type="checkbox"/>	15420687	Connor Robert	483-22-0702	10234-2478	260A	LPL TRAIN7
<input type="checkbox"/>	17319299	Robert Jack	429-51-341	10234	025A	LPL TRAIN2

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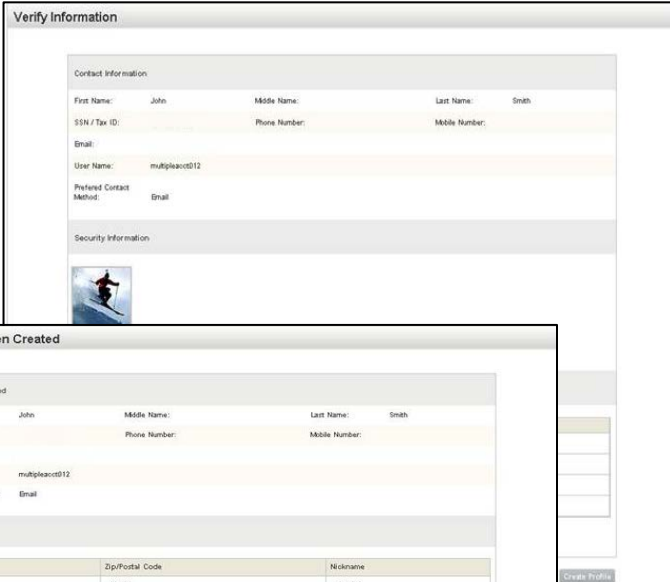
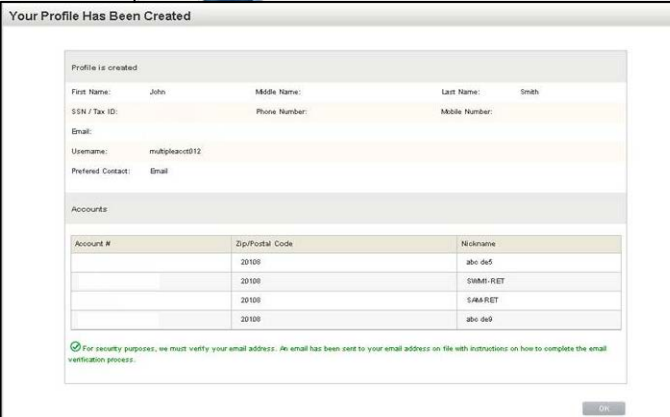
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**Step 7:** Verify the information you have entered and

select 

Select 

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

Profile is created

First Name: John Middle Name: Last Name: Smith  
 SSN / Tax ID: Phone Number: Mobile Number:  
 Email:  
 Username: multipleacc012  
 Preferred Contact Method: Email

Account #	Dip/Postal Code	Nickname
	20100	abe de5
	20100	SMM-RET
	20100	SMA-RET
	20100	abe de0

For security purposes, we must verify your email address. An email has been sent to your email address on file with instructions on how to complete the email verification 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.