ACCOUNT VIEW 2.0

User frequently asked questions

Enrollment

How do I enroll in Account View?

You can enroll in Account View by visiting www.myaccountviewonline.com and clicking on the 'Sign-up' button, then following the screen prompts. If you have any issues with creating your account, please reach out to your financial professional for help.

Note: If you are a current user of legacy Account View, you will need to contact your financial professional to upgrade your account.

How do I get the mobile app?

In order to have access to the mobile app, you must have an Account View 2.0 profile. Once you have registered for an online profile then you can download the LPL Account View mobile app from the App Store for iOS and Google Play for Android devices. To log in, use your username and password. You'll receive a text message with a registration code the first time you log in.

Does the Account View mobile app work with biometric options like Face ID?

Yes, Account View comes with enhanced security features like Face ID and Touch ID.

General Questions

Is there a fee to use Account View?

No, Account View is a free service provided by your financial professional.

Which browsers work best with Account View?

Chrome is the preferred browser, but Account View works with all major browsers (i.e., Chrome, Firefox, and Safari).

Can I access Account View from my mobile device?

Yes! You can download the Account View mobile app from the App Store for iOS and Google Play for Android devices.

What are the main benefits of using Account View?

You will have secure access to your financial account information anytime, anywhere, on any device. There are many features available in the Account View, and below are a few of them you will experience.

Account View 2.0 Features

- Easy-to-use mobile app
- Quick-view modern dashboard

- Enhanced security
- View progress on goals
- Paperless options
- File sharing capability

Can I see all the accounts for my household in Account View?

Yes. While each Account View profile provides access to the account for a single person by default, your financial professional can provide access to additional accounts held by members of your household.

What types of investments show in Account View?

Accounts managed by your financial professional will appear in Account View 2.0, whether they are held directly at LPL or networked to an LPL account.

How current is the account information?

During market hours prices and values update every 20 minutes. Same day transaction information may take up to an hour to appear in Account View.

Privacy & Security

Is my account information secure?

Yes, Account View uses the most up-to-date security measures to protect your account information, including:

- Unique usernames and passwords
- Multi-factor authentication
- Biometrics like Face ID and Touch ID

What if I forget or need to reset my password?

Click the **Forgot Password** link on the Account View login page. By correctly answering a series of personal security questions, you'll be directed to a page to reset your password.

What if I forget my username?

Click the **Trouble Logging** In link on the Account View login page, and follow the instructions.