ACCOUNT VIEW

GET TO KNOW
ACCOUNT VIEW 2.0

Connecting you to secure financial account access anytime, anywhere, on any device

LPL Financial

ACCOUNT VIEW

KEEPING YOU CONNECTED

The power of human connection has never been more important.

Your relationships with your friends and family are naturally top of mind, but your financial wellness likely is as well. To make it even easier for you to stay connected with your financial professional and your information, you need the right technology.

As the partner dedicated to supporting your financial professional, LPL is here to deliver that technology.

The Account View 2.0 mobile app and desktop portal brings enhanced capabilities, so you can access your information from anywhere, anytime. This allows you to focus on your financial aspirations and how you're trending toward your goals.

With a modernized dashboard, you get a simple view of your account information so you can see everything in one easy-to-understand view. Connectivity and convenience—that's what the Account View 2.0 experience delivers.

To help you get a feel for this new technology, we've provided the information and resources you'll need to get started with Account View 2.0.

ACCOUNT VIEW 2.0 AND YOU

Did you know that the average mobile user has 36 apps installed on their phone?

In 2020, 282 million people in the United States accessed the Internet via a mobile device, with the majority of users accessing information that's important to them via an app.[1] The world has gone mobile, and giving clients access to their financial information via an app is no longer an option for businesses today—it's a necessity.

That's why we're excited for you to get a feel for the Account View 2.0 mobile app and portal. It provides you with on-the-go access from the mobile app, and a modern, easy-to-use dashboard. Plus, you have the ability to go paperless with over 99% of your communications.

Technology needs to constantly evolve, and Account View is no different. We're continually building and enhancing Account View 2.0 to ensure it fits your needs and surpasses your expectations. You will continue to see new features and capabilities within Account View 2.0 mobile app and desktop portal.

To learn more about Account View and guidance on how to get started, visit **www.lpl.com/accountview**.

1 "Smartphone penetration rate as share of the population in the United States from 2010 to 2021," published by leading online statistics portal Statista; April 2020

SECURE FINANCIAL ACCOUNT ACCESS ANYTIME, ANYWHERE, ON ANY DEVICE

With the convenience and security of Account View 2.0, you can access your most up-to-date account information from your desktop, mobile phone, or tablet with just the click of a button or tap of a finger.

Did you know you can elect to have over 55 letters sent via eDelivery for a paperless experience. By electing paperless, it allows you to receive these letters quicker while providing a permanent place to access them.

1. Elect to go paperless; mailings of statement and trade confirmations are eliminated.
2. Your total portfolio value and any changes in value that occurred during the day.
3. Monitor individual account balances, deposits, and withdrawals and investment returns.
4. Identify accounts easily by account nickname or number.
5. Select a time frame over which to display account data.
6. Track how your investments performed at a specific time, or over a period of time.
7. View the asset allocation pie chart to see how your assets are allotted.
8. Linking your accounts offers you a 360-degree view of your portfolio, including held-away banking, brokerage, trust, 401(k) and pension assets, as well as REITs, variable annuities, and even offshore accounts.
9. Stay up-to-date with through general news, position news, market information and daily market updates.
10. View a snapshot of your top positions' recent performance.
11. Conduct a FINRA broker check at **brokercheck.finra.org**.

A note about security: LPL takes seriously the security and privacy of your information. Safeguarding data is our primary focus in the conception, design, and implementation of our platforms for you, like in Account View 2.0. Security is an evolving journey, and as cybercriminals change their tactics, we adapt and accelerate to stay one step ahead to protect you.

GET TO KNOW ACCOUNT VIEW 2.0

HOW TO GAIN ACCESS TO ACCOUNT VIEW 2.0

Follow these simple steps to easily self-register for Account View 2.0.

Step 1

Go to https://myaccountviewonline.com/login/.

Select **Sign Up**.

Step 2

Enter your email, phone, and the last four digits of the SSN that you provided to your financial professional. Then complete the **reCAPTCHA**. All fields are required.

ⓘ If you have difficulty creating your profile, please contact your financial professional.

Step 3

Select **Find Me** to continue.

Step 4

Review and **Agree** to the **Terms and Conditions**.

Step 5

Create and **Confirm** your password.

Step 6

Login with your new credentials.

Step 7

Select your verification method using your device to receive the **one-time password (OTP)** sent to your registered phone number.

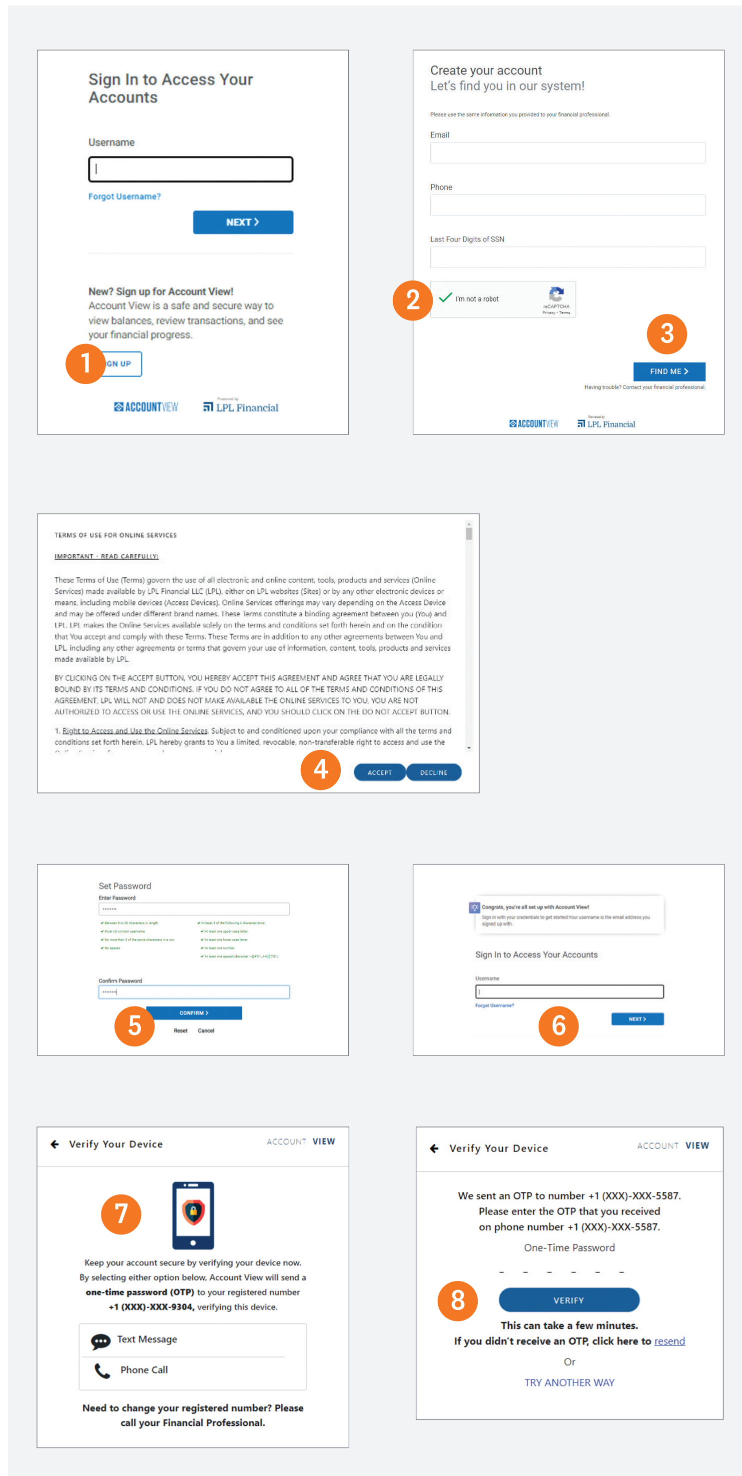
ⓘ You can receive your **one-time password (OTP)** via text message or a phone call.

Step 8

Enter your code, then click **Verify**. Your Account View 2.0 home page will appear.

If you have difficulty creating your profile, you can contact your financial professional for help.

If you're already using Account View, but have the legacy version that doesn't include app access, simply reach out to your financial professional to get started.



YOUR TOP QUESTIONS, ANSWERED

We've received some common questions from the financial professionals who are already using the product with their investors. Below are the top questions and corresponding answers:

If I have a legacy Account View 1.0 login, how do I create an Account View 2.0 account?

Please contact your financial professional.

How do I get started with Account View 2.0?

If your advisor is creating your Account View 2.0 account, then you will receive an email invite to register for Account View 2.0. Once you click on the link to start the activation process, you will be asked to enter the last four digits of your SSN and your email address that we have on file. The first time that you login we will send you a one-time passcode to your mobile phone number to verify your identity.

How do I get access to the mobile app?

After you've received the activation email and set your password you can download the LPL Account View mobile app and login with your email address and password. You'll get a text message with a code to register the app the first time you log in.

How do I reset my Account View 2.0 password?

Use the "Forgot Password" link from the mobile app or desktop platform via this URL at myaccountviewonline.com.

Does the Account View 2.0 mobile app work with biometric options like Face ID?

Yes. Face ID or Touch ID can be enabled during initial setup of the app.

How do I activate my Account View 2.0 access if I am currently an Account View 1.0 user?

Your financial professional will need to migrate your account and then you will receive an activation email. Select that link and follow the steps by entering the last four digits of your SSN or Tax ID and your email address. Remember your login username is the email address where you received your activation email. The first time you login to Account View 2.0—and any time you log in on a new device—you'll get a code sent to your phone. You'll need to enter this code to access Account View 2.0.

What should I do if I can't sign in to my account?
Reach out to your financial professional or follow the steps for a forgotten password.

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 will appear 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.

Which browsers are supported for accessing Account View?
Chrome is the preferred browser, but Account View is available on all major browsers (i.e., Chrome, Firefox, and Safari).

Can I access Account View from my mobile device?
Yes, you can access from a mobile device via a browser or the app, which you can find by searching for "LPL Account View" on the App Store for iOS and Google Play for Android devices.

How current is the account information?
During market hours, prices and values update every 20 minutes. Intraday transaction information may take up to an hour to appear in Account View 2.0.

Can I update my beneficiaries using Account View?
If you have eligible account types, including IRAs or 403b accounts, you'll have the ability to update Beneficiary information using Account View. Click Preferences from the settings cog located in the upper-right, then select the Relationships tab. From here, you'll be able to view and update eligible accounts.

How do I sign up for paperless?
Log in to your account at www.myaccountviewonline.com. Then click on "Paperless Status" on the top of the page. From there you can choose to either go 100% paperless for all eligible documents or pick and choose what you receive paperless and by mail delivery.

Can I give account access to others?
You may want to grant access to a significant other, or a family member, to view your investment account information. You may also want your accountant to have access to their account in order to download tax statements. You can control other user access to your account by visiting your user profile preferences and click on the Relationships tab.

Can I transfer money via ACH deposits?
You can transfer funds from an external bank account to a LPL non-retirement account and funds are typically available for use in their investment account the following business day. If you have a previously established a link to your bank account, then you are already set up to transfer funds. However, if you like to add, edit, or remove a connection to an external bank account, please contact your advisor.

ACCOUNT VIEW

Questions? Please contact our technical support help desk:

Call Monday – Friday, 9 a.m. – 6 p.m. ET (800) 558-7567.

When prompted, say "Online Access" to connect with a service professional.