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, 275 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.

Getting Started

Watch this short video about Account View

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

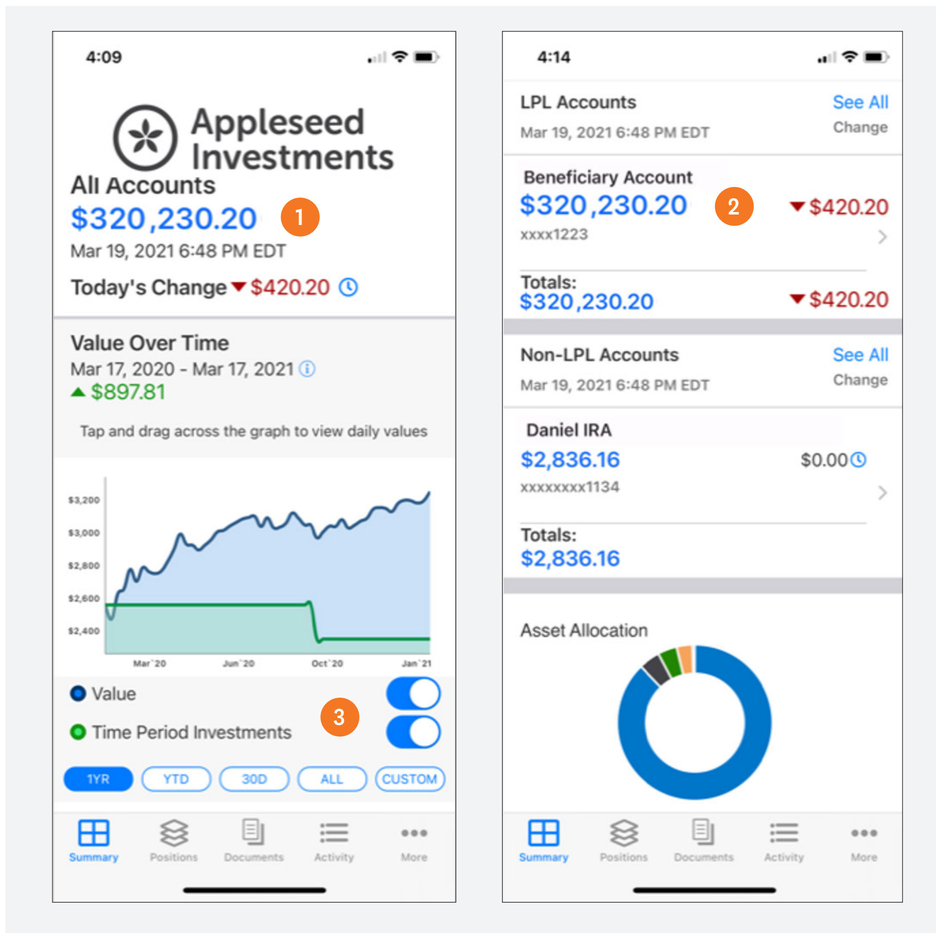
With the convenience and security of Account View 2.0, you can access your most up-to-date account information from your desktop, mobile phone, or tablet with just the click of a button or tap of a finger.

Understanding your accounts

1. Easily view the total portfolio value for all of your accounts at the top of the home page.
2. Monitor individual account balances, deposits and withdrawals, and investment returns.

Tracking your accounts

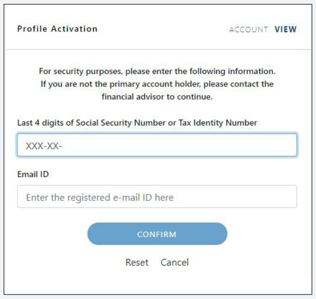
3. View account performance by time period using the time selector tool.



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.

HOW TO GAIN ACCESS TO ACCOUNT VIEW 2.0

Enrolling is easy. Follow these simple steps:

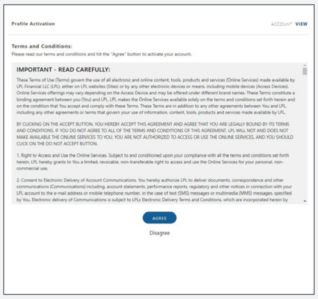


1

Verify Your Account:

You'll receive an email confirmation to the email address you provided. Only you have access to that email, and only you can activate your Account View access. Your email address is your username.

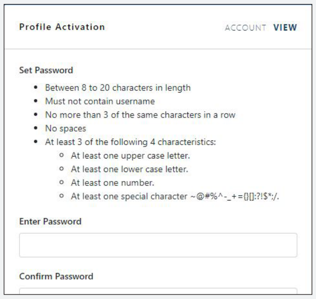
Enter the last four digits of your SSN or Tax ID and your registered email ID.



2

Accept the Terms and Conditions

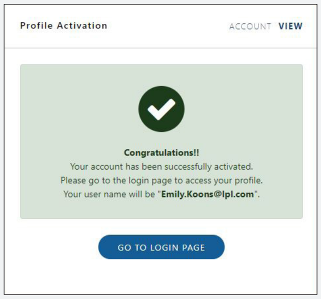
Please read through our terms and conditions and hit the "Agree" button to activate your account.



3

Create Your Password

Follow the on-screen instructions to create a secure password.



4

Congratulations!

You now have access to Account View. Your account has been successfully activated.

Once logged in you are now ready to begin using Account View 2.0!

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:

How do I get access to Account View and create an Account View 2.0 login?
Please contact your financial professional.

How do I get started with Account View 2.0?
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 access?
Select the link from your activation email. 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.

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