

New Investors Self-Provisioning

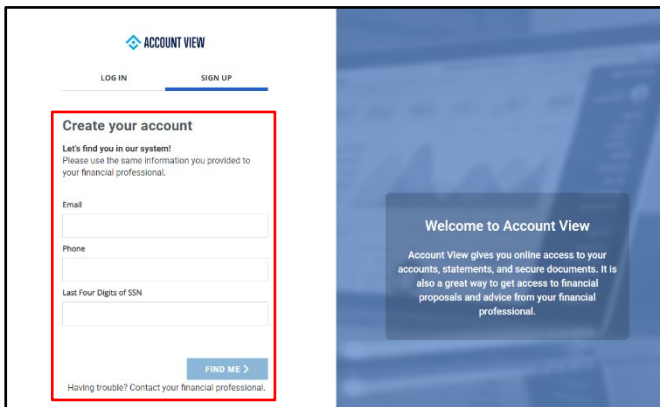
Overview

This guide explains how Investors can self-register for Account View.

Signing Up for Account View

Step 1: Go to accountview.lpl.com. Select **Sign Up**.

Step 2: Enter your *email, phone number, last four digits of SSN* that you provided to your financial professional. Then complete the *reCAPTCHA*. All fields are required.



ACCOUNT VIEW

LOG IN SIGN UP

Create your account

Let's find you in our system!
Please use the same information you provided to your financial professional.

Email

Phone

Last Four Digits of SSN

FIND ME >

Having trouble? Contact your financial professional.

Welcome to Account View

Account View gives you online access to your accounts, statements, and secure documents. It is also a great way to get access to financial proposals and advice from your financial professional.



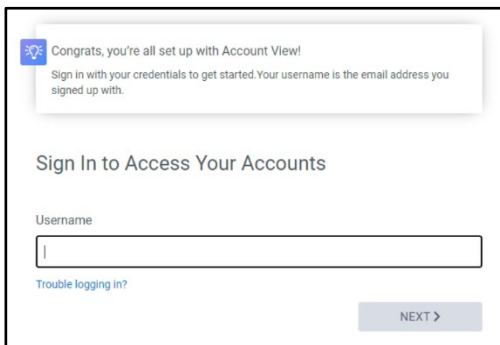
If you have difficulty creating your profile, please contact your financial professional.

Step 3: Click **Find Me** and continue.

Step 4: Review *Terms and Conditions* and click **Agree**.

Step 5: Create your new password and click **Confirm**.

Step 6: Log in with your new credentials.



Congrats, you're all set up with Account View!

Sign in with your credentials to get started. Your username is the email address you signed up with.

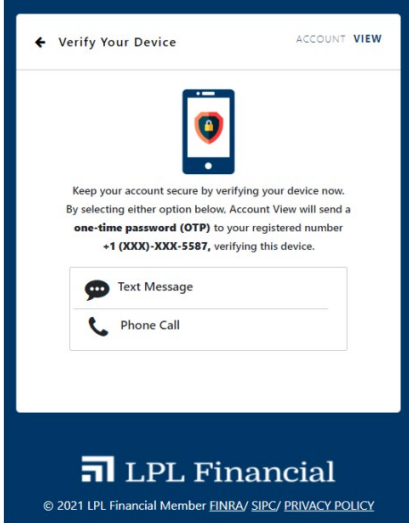
Sign In to Access Your Accounts

Username

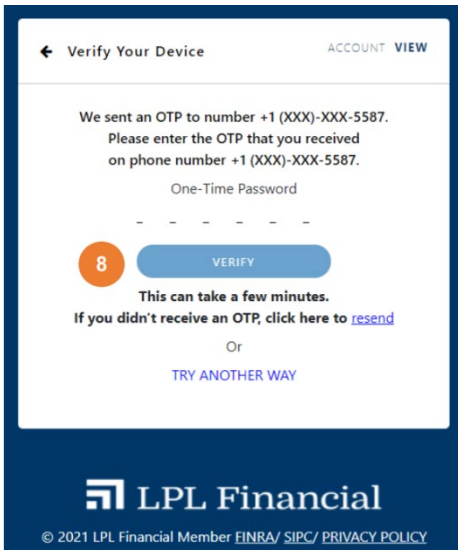
Trouble logging in?

NEXT >

Step 7: Select your verification method using your device to receive the *one-time password (OTP)* sent to your registered phone number.



Step 8: Enter your code, then click **Verify**. Your Account View and homepage will appear



Securities and advisory services offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. To the extent you are receiving investment advice from a separately registered independent investment advisor that is not an LPL Financial affiliate, please note LPL Financial makes no representation with respect to such entity.

Not Insured by FDIC/NCUA or Any Other Government Agency	Not Bank/Credit Union Guaranteed	Not Bank/Credit Union Deposits or Obligations	May Lose Value
---	----------------------------------	---	----------------