ACCOUNT VIEW 2.0

Your Top Questions, Answered

ACCESS

How do I get started with Account View 2.0 if I don't have an account?

You can ask your financial professional to create your account or you can sign up yourself—visit www.myaccountviewonline.com and select sign up. During the process you will be asked to enter your email address, phone number, and last four digits of your SSN that we have on file. The first time that you login we will send a one-time passcode to your phone number to verify your identity.

How do I get started with Account View 2.0?

If your financial professional 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 phone number to verify your identity.

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

Your financial professional will need to upgrade 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 log in 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.

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. After you've received the activation email and set your password you can download the LPL Account View mobile app from the Apple Store for iOS or Google Play for Android devices and log in with your username and password. You'll get a text message with a code to register the app the first time you log in.

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 reset my Account View 2.0 password?

From the mobile app or desktop platform login screen, click on the "Forgot Password" link. You can also edit your password from the security settings post-login.

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.

BENEFITS & FEATURES

What are the benefits of Account View 2.0?

Account View 2.0 allows you to:

- Access your accounts on a mobile device with the new mobile app
- Enjoy a modern, easy-to-use design, giving you a snapshot of your accounts
- Customize the mobile app summary page
- Enjoy enhanced security to ensure your information is safe and secure
- Manage your paperless preferences for statements, tax forms and other additional documents

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.

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.

Why are you asking for my marital status when updating my beneficiaries?

As part of the digital tool, we ask your marital status to help guide you through the beneficiary update process. Namely, if you live in a community property state, regulations may require a spousal beneficiary designation. Keep in mind that changes to marital status are only relevant to this workflow. If you need to update your marital status from what may be existing on your client record, please contact your financial professional.

How do I sign up for paperless?

Log in to your account at www.myaccountviewonline.com. Then click on "Go Paperless" 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.

SELF-SERVICE FEATURES

Beneficiary update

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 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.

What types of accounts are available for Beneficiary updates using Account View?

Currently, Account View supports beneficiary updates for individual non-retirement accounts, IRAs and 403b account types, including those in community property states. Later this year, we'll be launching support for additional account types, including Transfer on Death designations for Individual non-retirement accounts. We'll continue to seek opportunities to expand this capability to additional account types.

Do I need to submit paper forms as well?

No, no paper forms are needed. The Account View beneficiary update tool is a 100% paperless process.

Why are you asking for my Marital Status?

As part of the digital tool, we ask your marital status to help guide you through the beneficiary update process. Namely, if you live in a community property state, regulations may require a spousal beneficiary designation. Keep in mind that changes to marital status are only relevant to this workflow. If you need to update your marital status from what may exist on your client record, please contact your financial professional.

SECURITY

Why does LPL require a one-time passcode?

Account View 2.0 uses two-step authentication, which requires you to take additional steps to authenticate your account. This ensures that you are authorized to access the account. Two-step authentication is in place to better protect your accounts and reduce the risk of unauthorized access by verifying access whenever a new device or browser is used.

Can I require a one-time passcode for authentication for each login for extra security?

Yes. If you want extra security for each login for your mobile device you can choose not to enable a secondary authentication method such as face ID.

SUPPORT

If I have additional questions, whom can I contact?

Email our tech support team with your questions to: tech.support.mailbox@lpl.com
or call Monday – Friday, 9 am – 6 pm ET (800) 558-7567, option 9, option 2. When prompted, say "Account View" to connect with a service professional.