ACCOUNT VIEW 2.0

A BETTER WAY TO ACCESS YOUR INVESTMENTS

In today's fast-paced digital world, convenient account access is more important than ever.

ACCOUNT VIEW

Account View 2.0 upgrades

- Easy-to-use mobile app
- Quick-view modern dashboard
- Enhanced security
- View progress on goals
- Paperless options
- File sharing capability

With Account View 2.0, you can monitor your investment accounts, connect with your financial professional, and more—all from your mobile device.

Convenience, collaboration, and security

With the Account View 2.0 mobile app for Android and iOS, you can access your financial accounts anytime, anywhere, on any internet-connected device. Whether on your smartphone or desktop computer, you can customize your account right from the dashboard.

Goal trending is another essential Account View 2.0 feature—see how you're progressing and whether you're on track to meet the financial goals you set with your financial professional. Need to send your advisor a file? Easily and securely upload files in the newest version of Account View.

Speaking of security, protecting your financial information is our top priority. That's why Account View 2.0 utilizes up-to-date security options like multi-factor authentication, and biometrics, such as Face ID and Touch ID.

Coming soon

We developed Account View 2.0 to deliver a seamless online account experience that's full of new features, but we're not stopping there. Future enhancements include ACH and mobile check deposits, and the ability to message directly with your advisor within the mobile app or desktop view.

Get access today!

Visit www.myaccountviewonline.com to get started or contact your financial professional to upgrade.

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USER FREQUENTLY ASKED QUESTIONS

Enrollment

How do I upgrade to Account View 2.0, if I already have a legacy Account View 1.0 account?
You are able to upgrade your Account View version by logging into your Account View 1.0 account and then clicking on the upgrade link. Then you will follow the prompts on the screen to upgrade your account. It is easy and takes less than 5 minutes. If you have any issues with upgrading, please reach out to your financial professional for help.

Can I access Account View 2.0 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.

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 2.0 mobile app work with biometric options like Face ID?
Yes, Account View 2.0 comes with enhanced security features like Face ID and Touch ID.

General Questions

Is there a fee to use Account View 2.0?
No, Account View is a free service provided by your financial professional.

Which browsers work best with Account View 2.0?
Chrome is the preferred browser, but Account View works with all major browsers (i.e., Chrome, Firefox, and Safari).

Can I see all the accounts for my household in Account View 2.0?
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 are the main differences between Account View 1.0 and Account View 2.0?
There are many new features only available in the Account View 2.0 version. Below are a few of the current upgraded features you will experience. Also, over time you will continue to see more new features released to Account View 2.0.

Account View 2.0 Upgrades:

- Easy-to-use mobile app
- Quick-view modern dashboard
- Enhanced security
- View progress on goals
- More paperless options
- File sharing capability

What types of investments show in Account View 2.0?
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 2.0.

Privacy & Security

Is my account information secure?
Yes, Account View 2.0 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 **Forgot Username?** link on the Account View login page, and follow the instructions.

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