GET TO KNOW THE NEW ACCOUNTVIEW

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

LPL Financial

Welcome to the new Account View mobile app and portal

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. One of our newest enhancements to roll out is the new Account View mobile app and desktop portal.

The new Account View mobile app and desktop portal builds on the functionality in the legacy version of Account View you are familiar with, so you can 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 new Account View experience delivers.

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

WHAT'S INSIDE

THE NEW ACCOUNT VIEW AND YOU

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

What's more, by 2021, the mobile internet reach in the United States is set to reach 80% of the population, 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 new Account View. While the experience may not have everything you're familiar with in the legacy version of Account View, we're on a swift journey to deliver all of this functionality (and more!) to the new Account View over the next few months. And of course, the new Account View has the differentiating mobile component that is so critical in this digital era.

Getting Started

Now that you have access to the new Account View mobile app and desktop portal, it's time to get started.

Watch this short video about Account View

Want to Learn More?

If you're looking for additional resources about the new Account View, reach out to your financial professional and ask about an informative brochure and a guide on getting started with this new platform.

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

YOUR QUESTIONS, ANSWERED

How do I get access to the new Account View and create an Account View login?	Please contact your financial professional.
When will I receive my Account View activation email?	Once your financial professional has given you access to the new Account View, your access email should be emailed within 24–48 hours.
How do I reset my new Account View password?	Use the "Forgot Password" link from the mobile app or desktop platform via the new URL at myaccountviewonline.com/v2/login.
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 you received your activation email.
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.
What can I do with my Account View mobile app?	The LPL Account View mobile app allows you to check your portfolio information on the go and easily access your financial professional's contact information.
Can I see all the accounts for my household in Account View?	The new Account View is currently limited to unique users represented by a SSN or Tax ID.
What types of investments will appear in Account View?	Accounts held directly with LPL appear in Account View. Future enhancements will include account and positions held outside of LPL.
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).

Your Questions, Answered (*continued*)

Can I access Account View from my mobile device? If so, which ones?	Yes, the app is available for download from both the App Store for iOS and Google Play for Android devices.
How current is the account information?	Once you have access to your accounts in the new Account View mobile app and desktop portal, account information updates hourly.
I've noticed this version of Account View doesn't have as many capabilities as the last version. Can you please explain?	As this technology evolves, new features and capabilities will be added as time goes on. If you have questions about specific features, please contact your financial professional.

This material was prepared by LPL Financial

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