Go Digital with Account View and eDelivery

Secure financial account access anytime, anywhere, on any device.
Say goodbye to snail mail, clutter, and information that’s outdated the moment it’s printed. Say hello to secure, constant, anywhere online access to your financial information with Account View and eDelivery.

**a** Receive your statements, tax documents, and trade confirmations electronically with eDelivery.

**b** View your total portfolio value, asset allocations, and daily changes, and export financial information for analysis or tracking.

**c** Check market positions, their market value, and gain and loss details.

**d** Review, filter, sort, and download transaction data history from the last two years.

**e** Access quotes, market performance, and news.

The examples shown are for illustrative purposes only and do not represent an actual account view summary.
GETTING STARTED

Enrolling is easy. Follow these simple steps:


2. Create your confidential and secure profile.
   You’ll be asked to enter your contact information, and verify the last four digits of your Social Security number. It’s secure and safe—we use this information to protect your account.

3. From: noreply.myaccountviewonline@lpl.com
   Dear Valued Client:
   This message allows you to verify your email address associated with your Account View user profile. By clicking on the link below, your information will be verified by LPL Financial, completing the security process.
   https://myaccountviewonline.com/AccountView/Login/Logon/ActivateClient?guid=27b9a1a67fd8db3fc7c4d8a3f661d5e2.
   If your code has expired before you have completed the verification process, simply log in to MyAccountViewOnline.com and restart the email verification process.
   If you would like to stop receiving paper copies of your monthly financial statement, quarterly advisors performance reports, or trade confirmations, log in to MyAccountViewOnline.com and select the Go Paperless option.
   Sincerely,
   LPL Financial

4. Welcome
   You are 0% green. Enjoy the convenience of paperless statements and go 100% green now.
   Opt in to eDelivery by clicking Go Paperless.
   Eliminate printed monthly statements and trade confirmations through the mail. You have secure and private access to view these documents online through Account View.

   [Check box to not ask again]
To the extent you are receiving investment advice from a separate registered independent investment advisor, please note that LPL Financial is not an affiliate of and makes no representation with respect to such entity.

Not FDIC/NCUA Insured  Not Bank/Credit Union Guaranteed  May Lose Value  Not Insured by any Federal Government Agency  Not a Bank Deposit

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