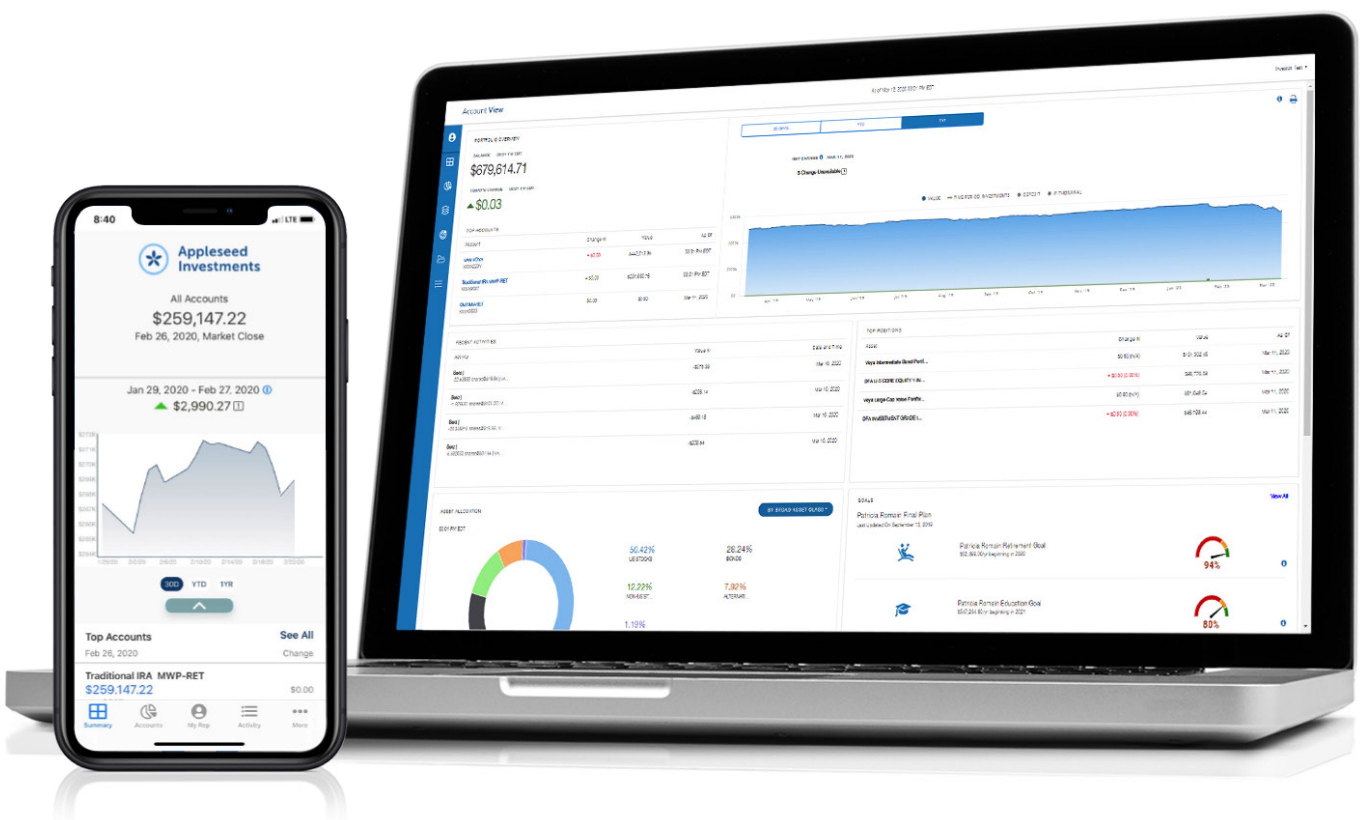
Go Digital with Account View 2.0

Secure financial account access anytime, anywhere, on any device.



LPL Financial

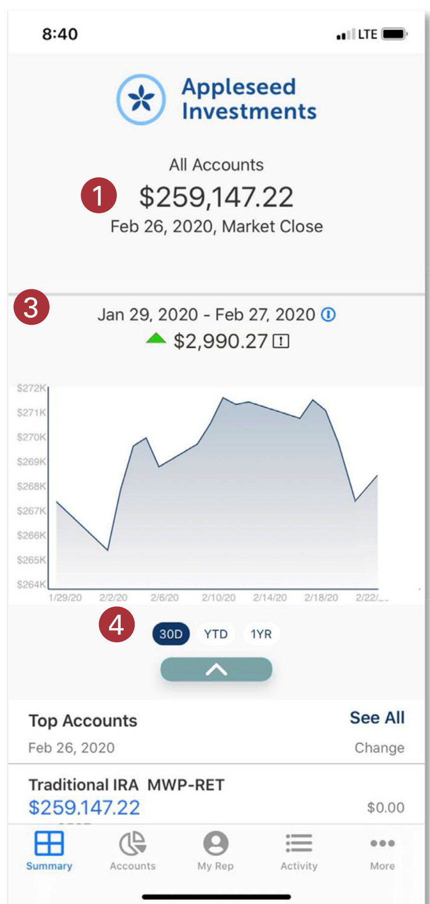
Say goodbye to information you must get from your desktop. Say hello to the secure, constant, and anywhere at your fingertips Account View mobile app.

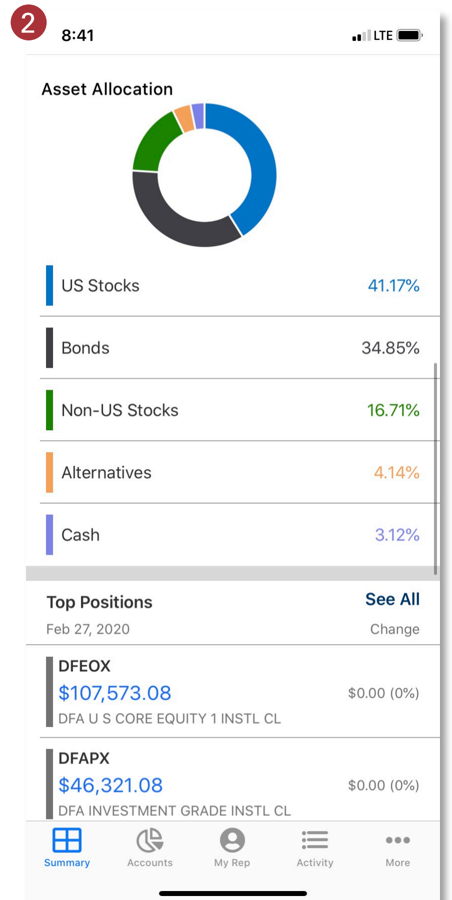
Understanding Your Accounts

1. Easily view the total portfolio value for all of your accounts at the top of the home page.
2. Monitor individual account balances, deposits and withdrawals, and investment returns.
3. Keep track of how your investments performed at a specific time or over a period of time with the "Value Over Time" chart.

Tracking Your Accounts

4. View account performance by time period using the time selector tool.

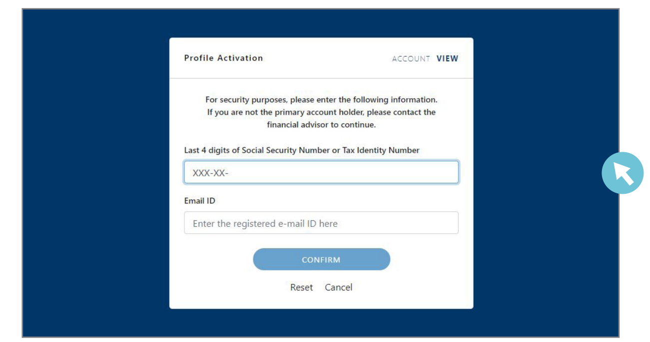




GETTING STARTED

Enrolling is easy. Follow these simple steps:

1



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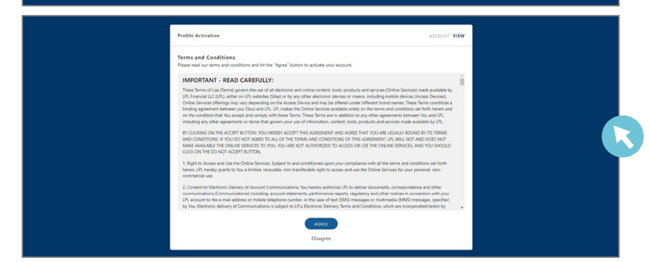

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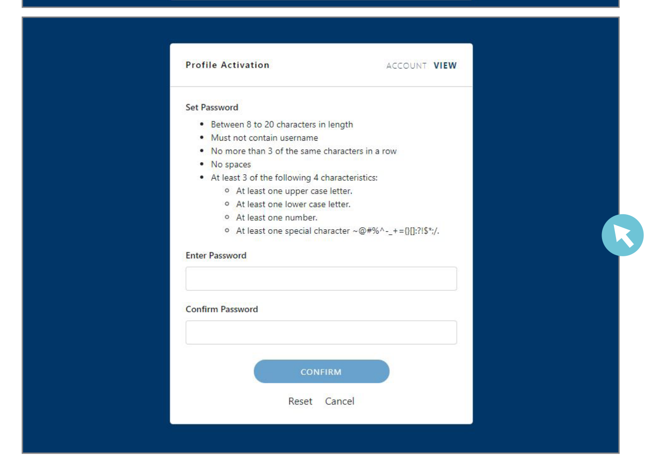

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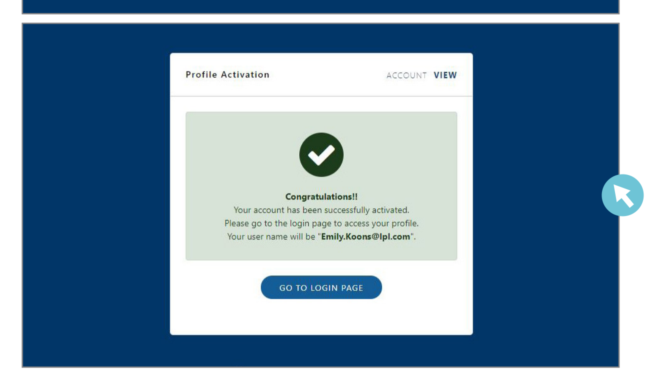

Step 1

Verify your account.

You'll receive an email confirmation to the email address you provided. Only you have access to that email, and only you can activate your Account View access. Your email address is your username.

Enter the last four digits of your SSN or Tax ID and email ID.

Step 2

Accept the terms and conditions.

Step 3

Create your password.

Step 4

Congratulations!

You now have access to Account View. Your account has been successfully activated.

Go to the login page and begin using Account View today.

The examples shown are for illustrative purposes only and do not represent an actual Account View summary.

PM-74466-0320
Tracking #1-959209 (Exp. 3/22)