

HOW TO GAIN ACCESS TO ACCOUNT VIEW 2.0

Follow these simple steps to easily self-register for Account View 2.0.

Step 1

Go to <https://myaccountviewonline.com/login/>.

Select **Sign Up**.

Step 2

Enter your email, phone, last four digits of SSN, and zip code information that you provided to your financial professional. Then complete the **reCAPTCHA**. All fields are required.

- ❗ Enter your **Mobile Phone** and your residential **Zip Code**. If you have difficulty creating your profile, please contact your financial professional.

Step 3

Select **Find Me** to continue.

Step 4

Review and **Agree** to the **Terms and Conditions**.

Step 5

Create and **Confirm** your password.

Step 6

Login with your new credentials.

Step 7

Select your verification method using your device to receive the **one-time password (OTP)** sent to your registered phone number.

- ❗ You can receive your **one-time password (OTP)** via text message or a phone call.

Step 8

Enter your code, then click **Verify**. Your Account View 2.0 home page will appear.

If you have difficulty creating your profile, you can contact your financial professional for help.

If you're already using Account View, but have the legacy version that doesn't include app access, simply reach out to your financial professional to get started.

Welcome to the new Account View login page!
Your saved password may not autofill. You can manually enter or reset it on the next page.

Sign In to Access Your Accounts

Username

Phone

Last Four Digits of SSN

Zip Code

New? Sign up for Account View!
Account View is a safe and secure way to view balances, review transactions, and see your financial progress.

1 **Sign Up**

Create your account
Let's find you in our system!

Please use the same information you provided to your financial professional.

Email
lp@lpl.com

Phone
(800) 877-7210

Last Four Digits of SSN
1234

Zip Code
92121

2 **I'm not a robot**

3 **FIND ME >**

Helpful? Contact your financial professional.

ACCOUNTVIEW LPL Financial

Terms and Conditions:
Please read our terms and conditions and hit the "Agree" button to activate your account.

TERMS OF USE FOR ONLINE SERVICES
IMPORTANT - READ CAREFULLY:

These Terms of Use (Terms) govern the use of all electronic and online content, tools, products and services (Online Services) made available by LPL Financial LLC (LPL) either on LPL websites (Sites) or by any other electronic devices or means, including mobile devices (Access Devices). Online Services offerings may vary depending on the Access Device and may be offered under different brand names. These Terms constitute a binding agreement between you (You) and LPL. LPL makes the Online Services available solely on the terms and conditions set forth herein and on the condition that you accept and comply with these Terms. These Terms are in addition to any other agreements between You and LPL, including any other agreements or terms that govern your use of information, content, tools, products and services made available by LPL.

BY CLICKING ON THE ACCEPT BUTTON, YOU HEREBY ACCEPT THIS AGREEMENT AND AGREE THAT YOU ARE LEGALLY BOUND BY ITS TERMS AND CONDITIONS. IF YOU DO NOT AGREE TO ALL OF THE TERMS AND CONDITIONS OF THIS AGREEMENT, LPL WILL NOT AND DOES NOT MAKE AVAILABLE THE ONLINE SERVICES TO YOU. YOU ARE NOT AUTHORIZED TO ACCESS OR USE THE ONLINE SERVICES AND YOU SHOULD CLICK ON THE DO NOT ACCEPT BUTTON.

1. **Right to Access and Use the Online Services.** Subject to and conditioned upon your compliance with all the terms and conditions set forth herein, LPL hereby grants to You a limited, revocable, non-transferable right to access and use the Online Services for your personal non-commercial use.

2. **Consent to Electronic Delivery of Account Communications.** You hereby authorize LPL to deliver documents, correspondence and other communications (Communications) including account statements, performance reports, regulatory and other notices in connection with your LPL account to You in such medium and such electronic address(es) as You may specify in the LPL account information you provide.

4 **AGREE**
Disagree

Set Password

Enter Password

Confirm Password

5 **CONFIRM >**
Reset Cancel

Sign In to Access Your Accounts

Username

6 **NEXT >**

Verify Your Device ACCOUNT VIEW

7

Keep your account secure by verifying your device now.
By selecting either option below, Account View will send a **one-time password (OTP)** to your registered number +1 (XXX)-XXX-5587, verifying this device.

Text Message
Phone Call

Verify Your Device ACCOUNT VIEW

We sent an OTP to number +1 (XXX)-XXX-5587.
Please enter the OTP that you received on phone number +1 (XXX)-XXX-5587.

One-Time Password

8 **VERIFY**

This can take a few minutes.
If you didn't receive an OTP, click here to **resend**
Or
TRY ANOTHER WAY