

LPL Account View

Your Online Portal for Your Financial Investments and Paperless Statements

Easy Steps to Set up LPL Account View Access

- Gather Account Information
- Access Account View through your advisor's website
- Activate Your Accounts

With LPL Account View you can see your account activity anytime 24 hours a day, 7 days a week, have identity theft protection with confidential User ID, and environmental participation by opting for paperless statements. Three benefits from one service!

Easily accessed through your financial advisor's website online at no cost to you, you can obtain information that is consistently refreshed (intraday for securities and daily for mutual funds, for instance).

Gather Account Information

Make a list of your account numbers (from your monthly statement) and primary Social Security Number / Tax ID number associated with those accounts that you wish to access through LPL Account View. Decide upon a nickname for each account that will help you personalize and identify the account quickly while viewing online.

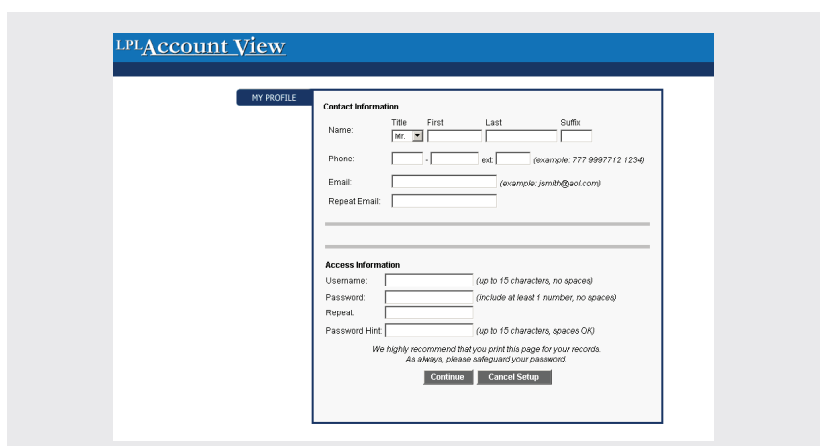
Access LPL Account View

Simply click on the "Sign Up for Account View" button on the LPL Account View log In screen. When "Account View Authorization and Terms of Use" agreement displays, read and select the "I accept the Terms and Conditions" option, which is located at the bottom of the screen. Then select "Continue."



Complete the My Profile Screen

Enter your name, phone and email address. Create a Username and Password of your choice, which will be your unique identifier to securely access your accounts thereafter. **Be sure to make a note of the Username and Password you have selected.** Click "Continue" and the Account Information screen will appear.



Complete the Account Information Screen

Nicknaming each account is recommended for easy identification of each of your accounts. For instance:

- John's Roth
- Mary's 401(k)
- Family Trust
- Joint Investment

When you click "Submit" a summary of the accounts entered will display.

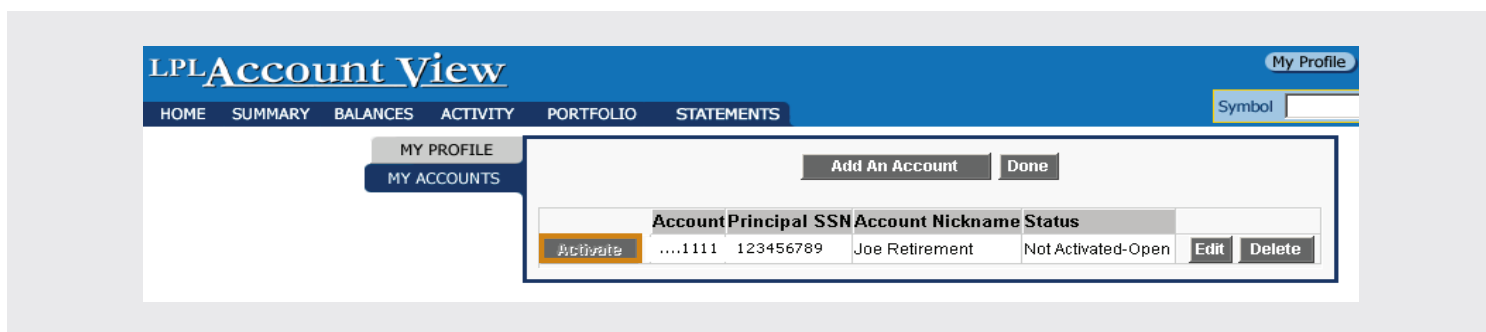
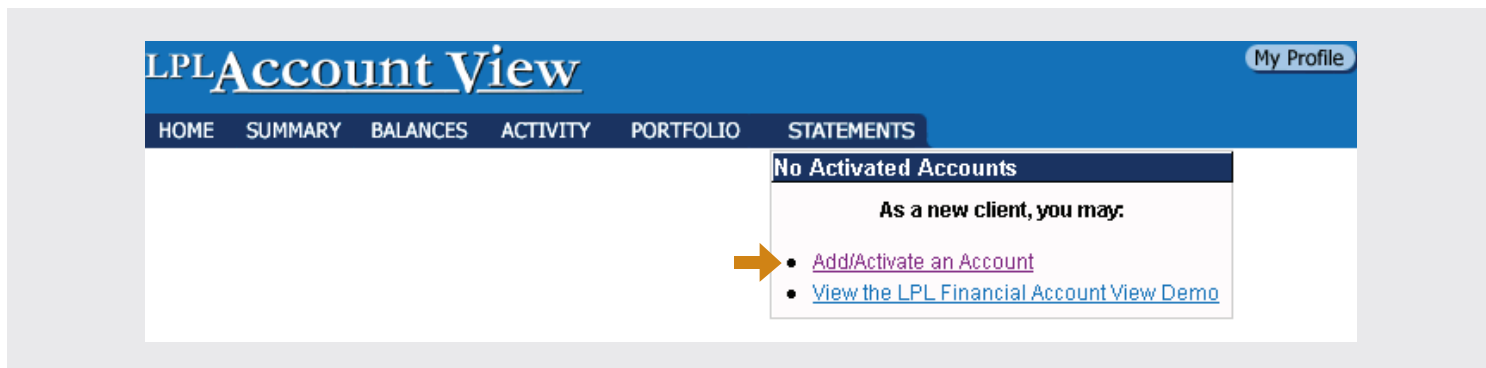
Add Additional Accounts

Add additional accounts by selecting "Add An Account." All accounts for the household may be entered at this time, or later if you prefer. Once all accounts have been entered, click "Done." This initiates a process of verification. To maintain the highest level of security, a letter is sent to the account's mailing address with a unique code to activate that account. If this letter doesn't arrive within five to seven business days, contact your advisor.

Account	Principal	SSN	Account Nickname	Status	
Activate	...1111	123456789	Joe Retirement	Not Activated-Open	Edit Delete

Activate Your Account

1. You will receive an activation letter from LPL Financial providing detailed information for activating your account using the code included with the letter. Log on to LPL Account View with Username and Password and follow the instructions on the Activation letter.
2. Click "Activate" and you'll be taken to a popup box identifying the account. Type in the activation code and click "Submit" to complete the activation. You will have immediate access to all the interactive features offered in LPL Account View.



Go Paperless

Once you have experienced the convenience and ease of reviewing your portfolio on line, you may want to consider "paperless option" for retrieving your monthly statement through LPL Account View. Aside from a valuable service that provides great convenience, it exemplifies an ecologically sensitive alternative for the delivery and storage of your important financial documents.