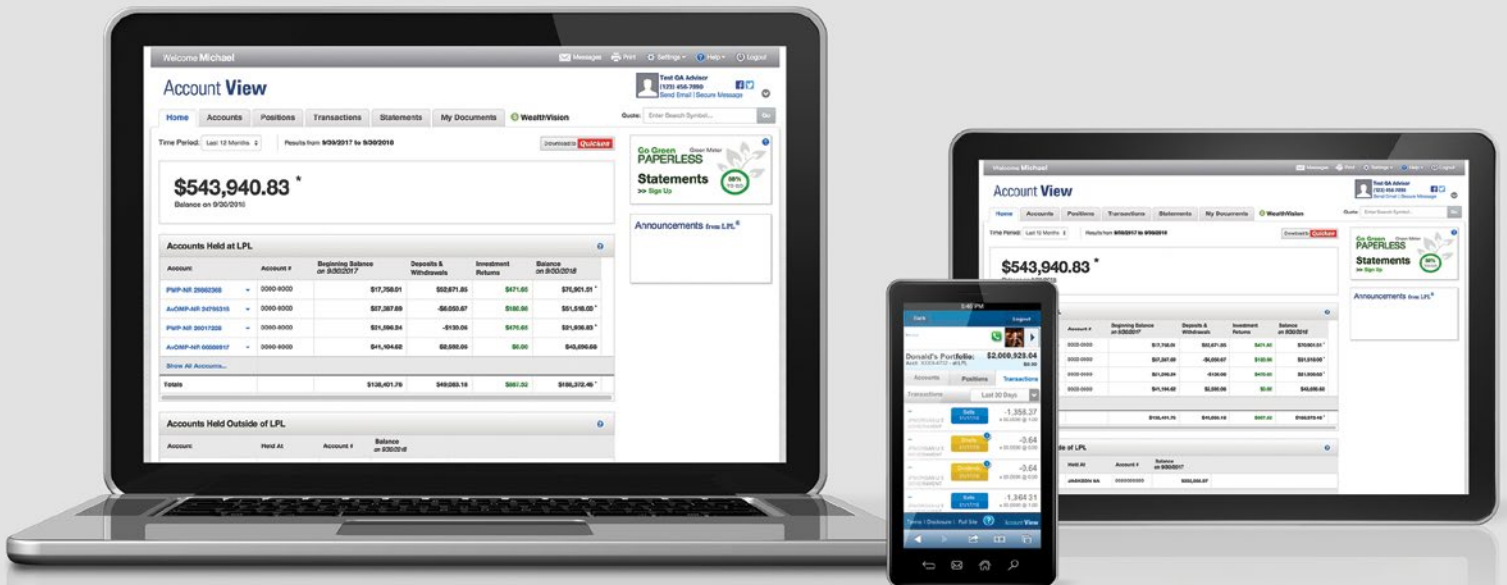


# Go Digital with Account View and eDelivery

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Say goodbye to snail mail, clutter, and information that's outdated the moment it's printed.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.

## 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 Distinguish between accounts held at LPL and those held outside, and check balances for outside accounts.
- 4 Keep track of how your investments performed at a specific time or over a period of time by simply hovering over the Value Over Time chart.

## Tracking Your Accounts

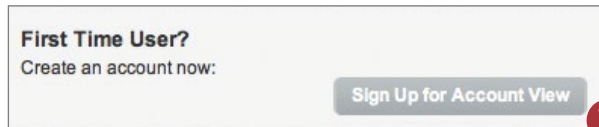
- 5 View account performance by time period using the time selector tool.
- 6 Receive statements, tax documents, and trade confirmations electronically with eDelivery.

The screenshot shows the 'Account View' dashboard for a user named Michael. At the top, there's a navigation bar with 'Home', 'Accounts', 'Positions', 'Transactions', 'Statements', and 'My Documents'. A 'Time Period' selector is set to 'Last 12 Months' with 'Results from 9/30/2017 to 9/30/2018'. A large box displays the total portfolio value: **\$543,940.83\*** (Balance on 9/30/2018). Below this, there are two tables: 'Accounts Held at LPL' and 'Accounts Held Outside of LPL'. The LPL table lists accounts like 'PWP-NR 2962388' with columns for Beginning Balance, Deposits & Withdrawals, Investment Returns, and Balance. The 'Outside of LPL' table shows 'VAN JACKSON NA 1004...'. A 'Value Over Time' chart shows a green area chart of portfolio value from 1/10/17 to 9/30/18. At the bottom, an 'Asset Allocation' pie chart shows the distribution: Common Stock (25.7911%), Money Market (7.4181%), Mutual Fund - Open-end (30.0746%), Other (1.7749%), Corporate Bond (17.7938%), Mortgage-backed Bond (3.1084%), and Variable Annuity (14.0391%).

# GETTING STARTED

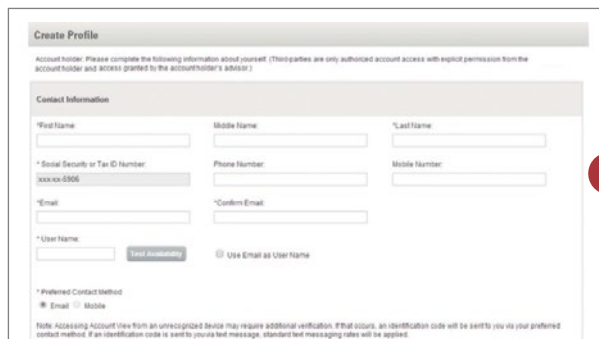
Enrolling is easy. Follow these simple steps:

1



Visit [www.myaccountviewonline.com](http://www.myaccountviewonline.com) and click Sign Up for Account View.

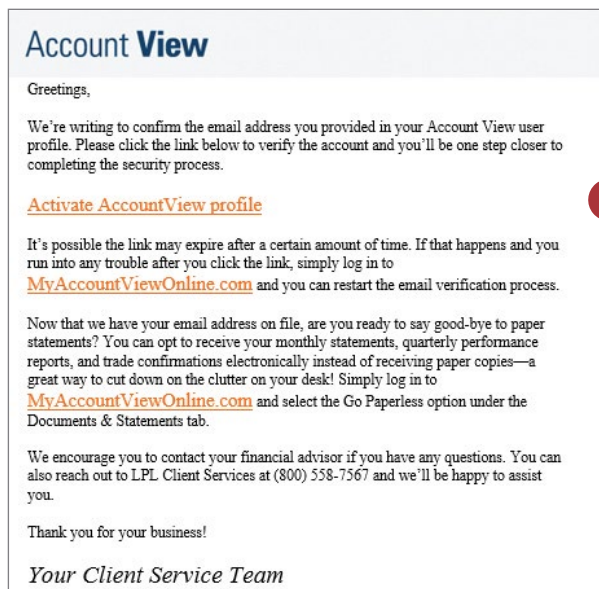
2



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.*

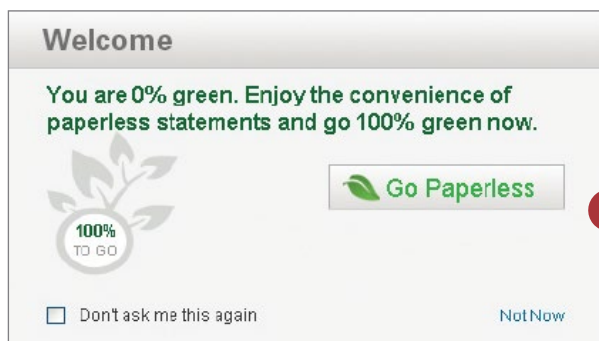
3



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.*

4



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.*

This information has been prepared by LPL Financial, LLC.

To the extent you are receiving investment advice from a separate registered independent investment advisor, please note that LPL Financial LLC 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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