ACCOUNT VIEW - CLIENT GUIDE

Creating an Account View 2.0 Profile

You will receive an email from LPL with a link to activate/create your account. Click on the link, then complete the following steps:

1. Enter the last four digits of your SSN, and email address.
   (Note: If LPL has a different email on file it will not find you. Contact us to change your primary LPL email)
2. Read Terms of Use for Online Services and select “Agree” to proceed.
3. Next, you will be prompted to create a password. (Your username is auto-generated based on the email address provided). Enter a password and enter it again and hit the “Confirm” button.
4. You will see a confirmation message that you are set up with Account View and ready to log in. To login in, enter your username (your email). Click on the “NEXT” button
5. You will be asked to enter your password and then to verify your device. Choose how you want to verify, either text or phone call.
6. You will receive a verification code via text or phone, depending on which delivery method your chose. Enter the verification code and click on the “VERIFY” button.
7. Once prompted, accept the terms and conditions.
8. Welcome to the New Account View! (you rare in!) to continue in Account view, click the “Next” button. From here you can choose paperless options, view your dashboard, download and upload statements/documents, see your accounts/positions and your balances. If you need help navigating from here, give us a call.

Logging into Account View from a Mobile Phone/KWP Website

Once our Account View 2.0 profile is created and you have created your new log in, you can access Account View 2.0 from your mobile phone or from your computer browser. **The mobile app must first be downloaded from mobile app stores.** Search for “LPL Account View.” You can log in from a browser (computer/iPad) or the mobile app (smart phone).

To log into Account View using a browser, complete the following steps:

1. From the King Wealth Planning website, on the Client Resources page, click the **VIEW MY LPL ACCOUNT (Account View)** button.
2. Enter your username and choose **Next**.
3. Once prompted, enter your password, and click “Sign In”.
   You will be taken to the Overview page of your Account View dashboard.

Updating or Adding an Account to the Client Profile

Please consult King Wealth Planning to update or add an account to your profile.

Resetting Your Password

To reset your Account View password, complete the following steps:

1. From the Client Resources page, click the **VIEW MY LPL ACCOUNT (Account View)** button,
2. Enter your username and choose **Next**.
3. Choose “Forgot Password”
4. You will be prompted to verify your information and to choose a new password. Once complete you can log in with your new password.

Note: if you do not remember your username, click on the “Trouble Logging In?” link and LPL will email you your username.