

ACCOUNT VIEW 2.0

New Investor Self-Provisioning How To Guide

Overview

This guide explains how Investors can self-register for Account View 2.0.

Icons



Alert or Important



Information or Note



Frequently Asked Questions

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Signing Up for Account View 2.0

1. Go to <https://myaccountviewonline.com/login/>. Select **Sign Up**.

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


[Trouble logging in?](#)

NEXT >

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

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.

3. Select **Find Me** to continue.

Create your account

Let's find you in our system!


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

Email

Phone

Last Four Digits of SSN

Zip Code

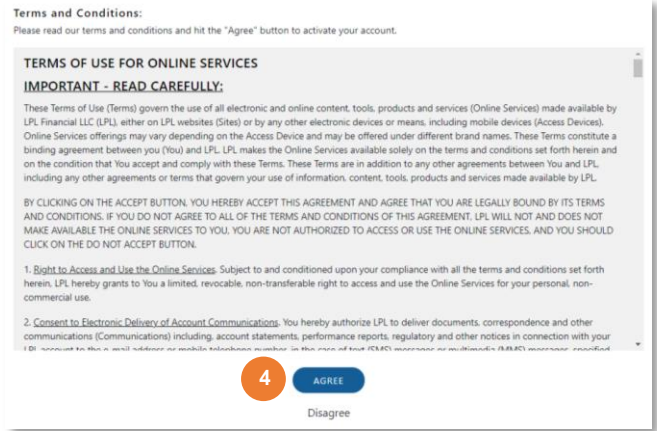
2  I'm not a robot
reCAPTCHA
Privacy - Terms

3 FIND ME >

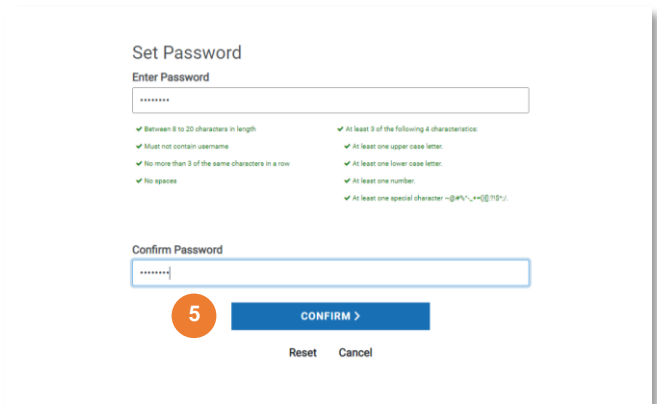
Having trouble? Contact your financial professional.

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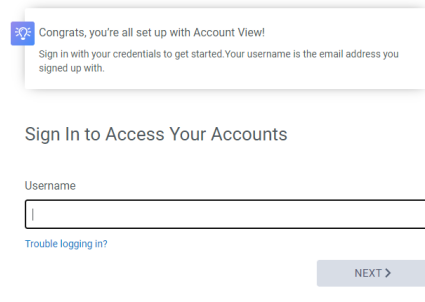
4. Review and **Agree** to the **Terms and Conditions**.




5. Create and **Confirm** your password.

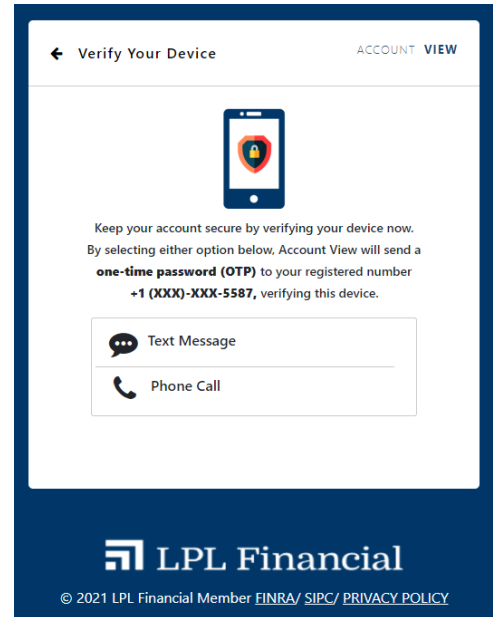


6. Login with your new credentials.

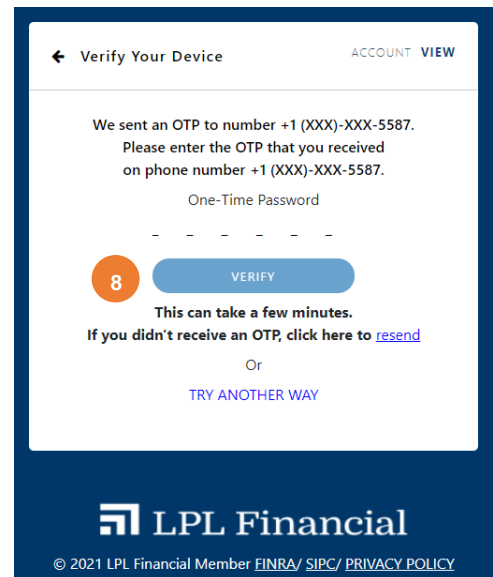


7. Select your verification method using your device to receive the **one-time password (OTP)** sent to your registered phone number.

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



8. Enter your code, then click **Verify**. Your Account View 2.0 homepage will appear.



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