

Account View 2.0 | Getting Started Guide

OVERVIEW

This guide explains how to complete the sign in and two-step authentication process for Account View 2.0 desktop and mobile applications, as well as a review of the paperless settings available in the portal.

ICONS



Alert or Important



Frequently asked Questions



Quick Tip



Information or Note

CONTENTS

Overview	1
Icons	1
Verifying your iPhone Device	2
Two-Step Verification Using Passcode.....	4
Two-Step Verification Using Biometrics.....	5
Verifying your Android Device.....	6
Two-Step Verification Using Passcode.....	9
Two-Step Verification Using Biometrics.....	10
Verifying Your Desktop or Other Devices	11
Changing Your Registered Number	12
Paperless Settings	13



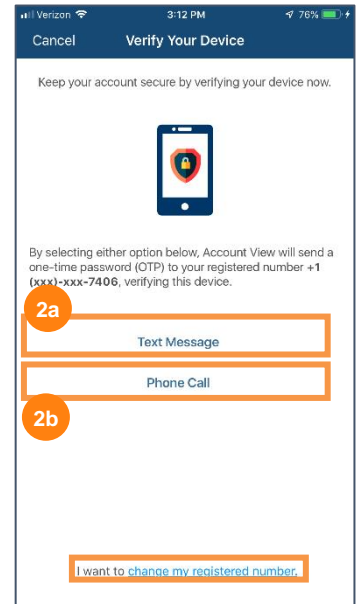
Account View 2.0 | Getting Started Guide

VERIFYING YOUR IPHONE DEVICE

The process to complete two-step verification begins by opening and signing in to Account View.

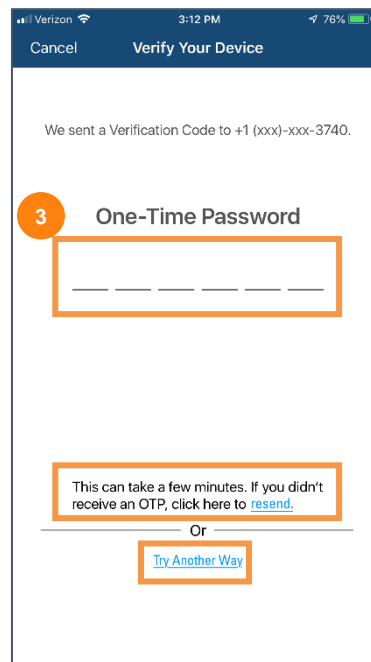
1. Sign in to Account View using your existing Account View username and password.
2. Select the method by which you would like to receive your one-time password.
 - a. Tap **Text Message** to receive your one-time password via text message to the number registered to your account.
 - b. Tap **Phone Call** to receive your one-time password by phone call to the number registered to your account.

You will immediately receive a text message or phone call based on your selection.



You can change your registered number by clicking the **I Want to Change My Registered Number** link at the bottom of the screen. Skip to the [Changing Your Registered Number](#) section in the guide to follow the steps of that process.

3. Enter the password provided to you via text message or phone call.



Tap the **Resend OTP** link at the bottom of the screen to have your one-time password resent to your phone.

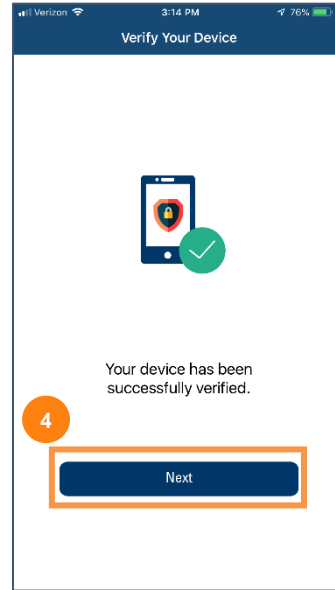


If for any reason the method you chose to receive your password does not work, tap the **Try Another Way** link near the bottom of the screen. You will be redirected to the previous screen and allowed to choose a different method to receive your password.



Account View 2.0 | Getting Started Guide

4. Click the **Next** button to continue.

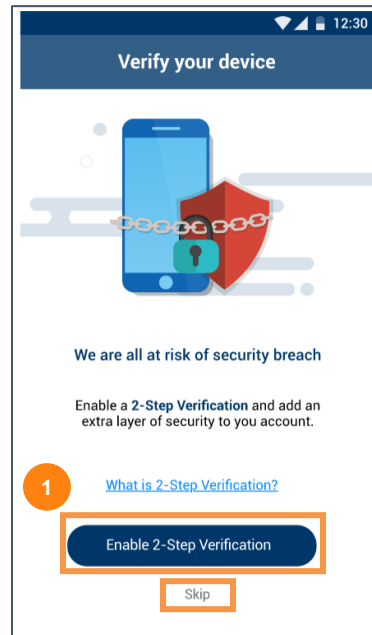


The next step is to enable 2-Step Verification. Two-step verification adds an extra layer of security to your account. This section will walk you through how to complete the verification process.

1. Click **Enable 2-Step Verification**.

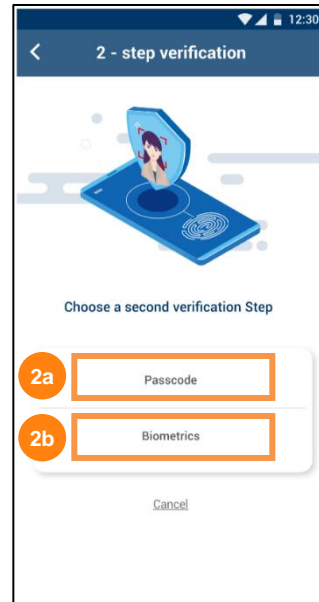


Skipping 2-Step Verification will prompt One-Time Password device verification each time you access Account View. Enabling 2-Step Verification makes logging into Account view easier and more secure each time you login.



Account View 2.0 | Getting Started Guide

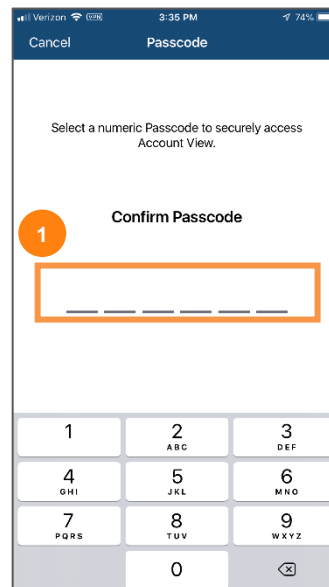
2. In this step, you can choose a second type of verification method:
 - a. Tap **Passcode** if you would like to use a passcode to log in to your account.
 - b. You will see an option to choose Biometrics, if that feature is currently enabled on your device. Tap **Biometrics** to log in to your account.



Two-Step Verification Using Passcode

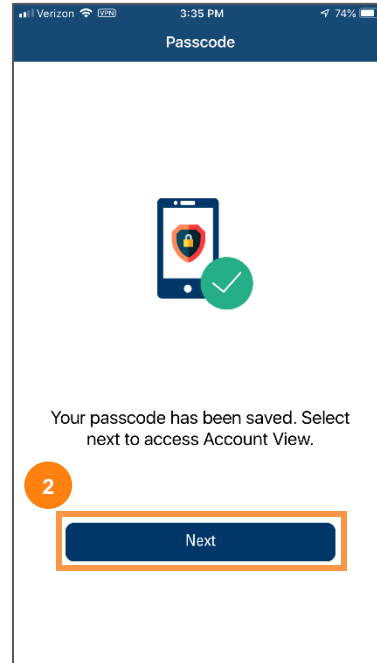
If you choose the Passcode option as your second type of verification, you are guided through the following steps:

1. Enter a **6-digit passcode** of your choice.



Account View 2.0 | Getting Started Guide

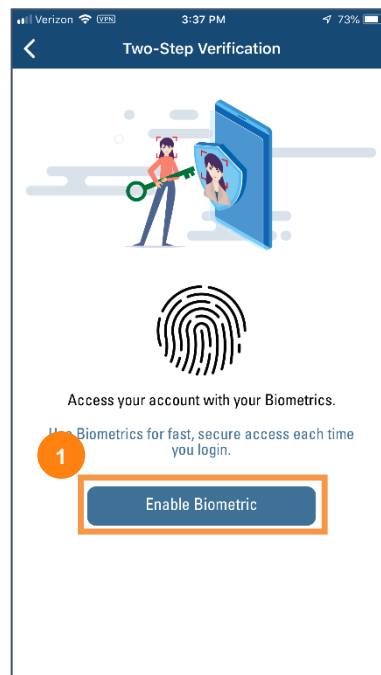
2. Click the **Next** button to continue on to Account View.



Two-Step Verification Using Biometrics

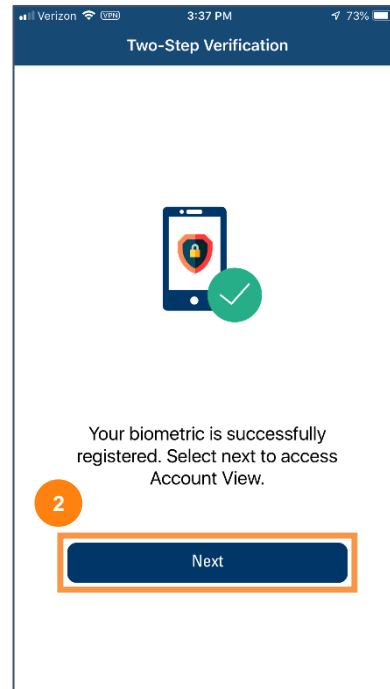
If you choose the Passcode option as your second type of verification, you are guided through the following steps:

1. Tap **Enable Biometric**.



Account View 2.0 | Getting Started Guide

2. Click the **Next** button to continue on to Account View.



VERIFYING YOUR ANDROID DEVICE

The process to complete two-step verification on your Android device begins by opening and signing in to Account View.

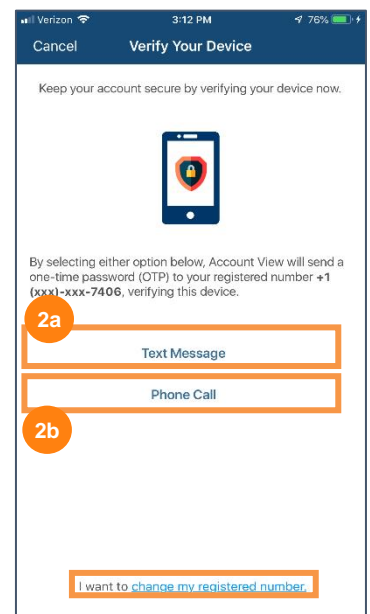
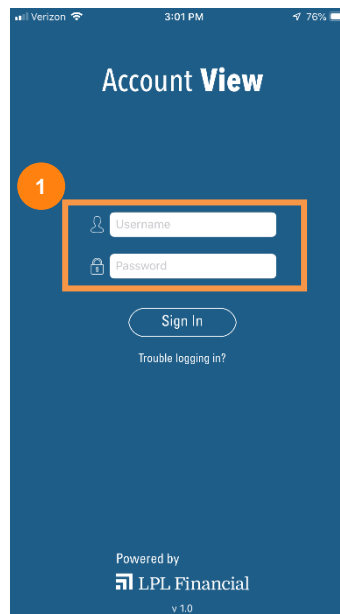
1. Sign into Account View using your existing Account View username and password.
 - a. Tap **Text Message** to receive your one-time password via text message to the number registered to your account.
 - b. Tap **Phone Call** to receive your one-time password by phone call to the number registered to your account.



You will immediately receive a text message or phone call based on your selection.



You can change your registered number by clicking the **I Want to Change My Registered Number** link at the bottom of the screen. Skip to the [Changing Your Registered Number](#) section in the guide to follow the steps of that process.



Account View 2.0 | Getting Started Guide

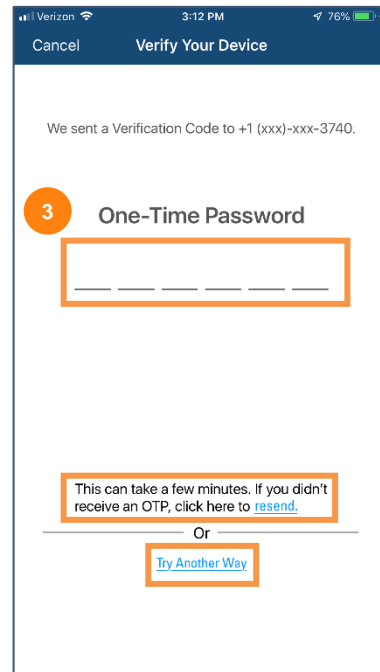
3. Enter the password provided to you via text message or phone call.



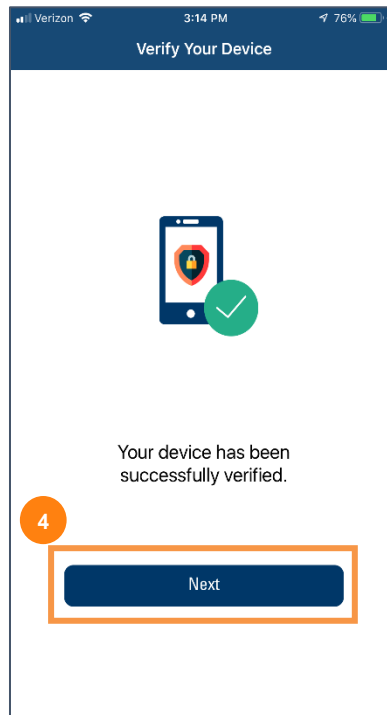
Tap the **Resend OTP** link at the bottom of the screen to have your one-time password resent to your phone.



If for any reason the method you chose to receive your one-time password does not work, tap the **Try Another Way** link near the bottom of the screen. You will be redirected to the previous screen and allowed to choose a different method to receive your password.



4. Click the **Next** button to continue.



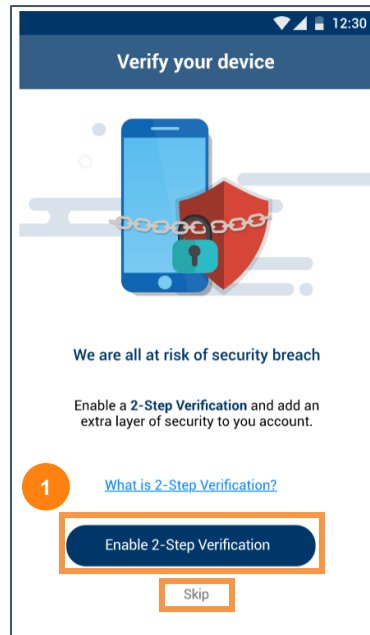
Account View 2.0 | Getting Started Guide

The next step is to enable 2-Step Verification. Two-step verification adds an extra layer of security to your account. This section will walk you through how to complete the verification process.

1. Click **Enable 2-Step Verification**.

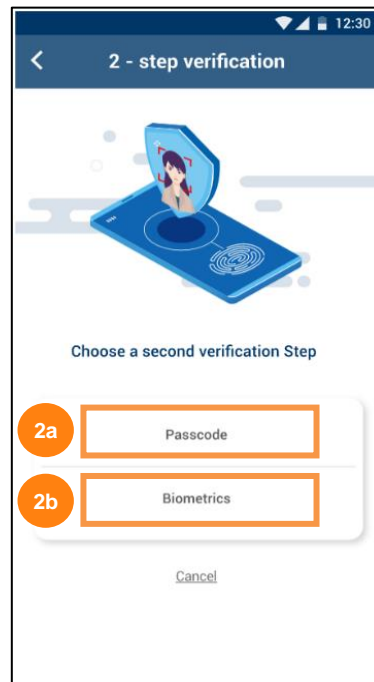


Skipping 2-Step Verification will prompt One-Time Password device verification each time you access Account View. Enabling 2-Step Verification makes logging into Account view easier and more secure each time you login.



2. In this step, you can choose a second type of verification method:

- a. Tap **Passcode** if you would like to use a passcode to log in to your account.
- b. You will see an option to choose Biometrics, if that feature is currently enabled on your device. Tap **Biometrics** to log in to your account.

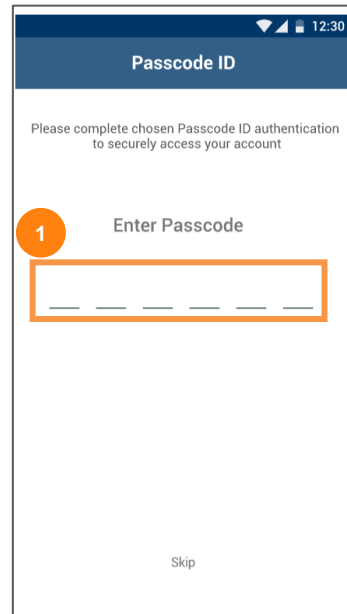


Account View 2.0 | Getting Started Guide

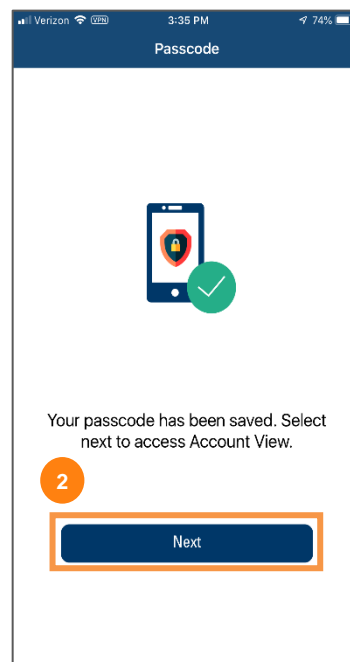
Two-Step Verification Using Passcode

If you select choose the Passcode option as your second type of verification, you are guided through the following steps:

1. Enter a 6-digit passcode of your choice.



2. Click the **Next** button to continue on to Account View.

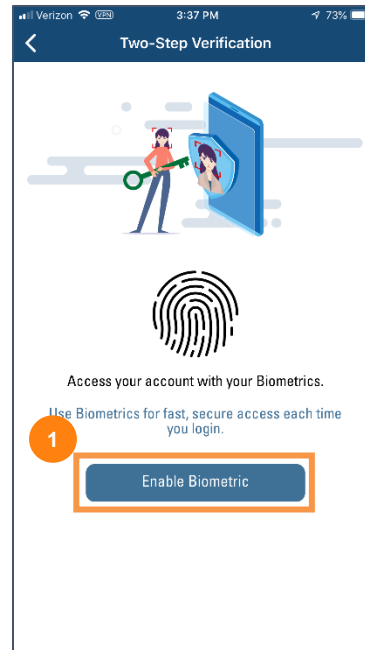


Account View 2.0 | Getting Started Guide

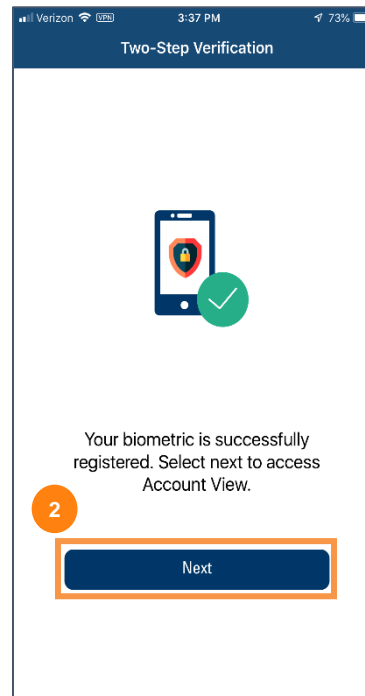
Two-Step Verification Using Biometrics

If you choose Biometrics as your second type of verification, you are guided through the following steps:

1. Tap **Enable Biometric**.



2. Click the **Next** button to continue on to Account View.



Account View 2.0 | Getting Started Guide

VERIFYING YOUR DESKTOP OR OTHER DEVICES

1. Sign into Account View using **your username and password**.
2. Click **Sign In**.



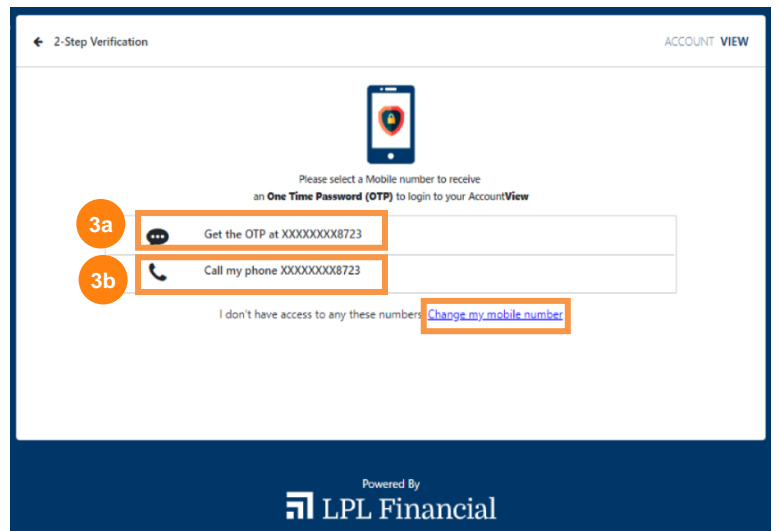
3. Select the method by which you would like to receive your one-time password:
 - a. Click **Get the OTP** to receive a one-time password via text message to the number registered to your account.
 - b. Click **Call my phone** to receive a one-time password by phone call to the number registered to your account.



You will immediately receive a text message or phone call based on your selection.



You can change your registered number by clicking the I Want to Change My Registered Number link. Skip to the [Changing Your Registered Number](#) section in the guide to follow the steps of that process.



Account View 2.0 | Getting Started Guide

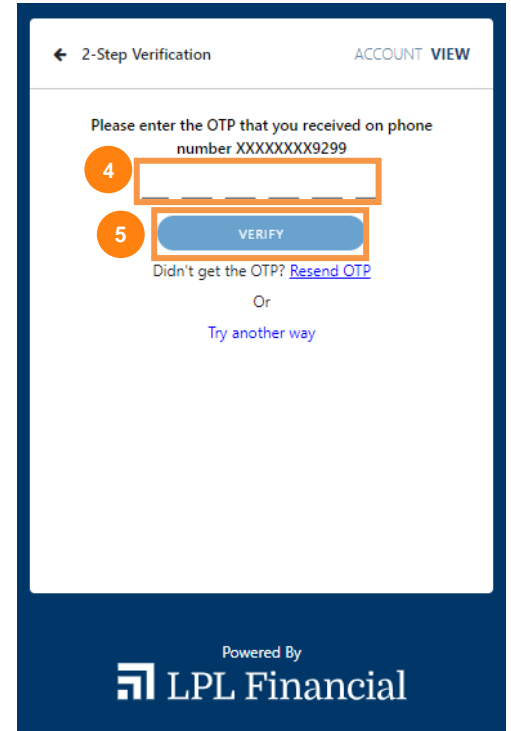
4. Enter the password provided to you via text message or phone call.
5. Click **Verify**.



At the bottom of the screen, you will see a **Resend OTP** link. Click that link to have your one-time password resent to your device.



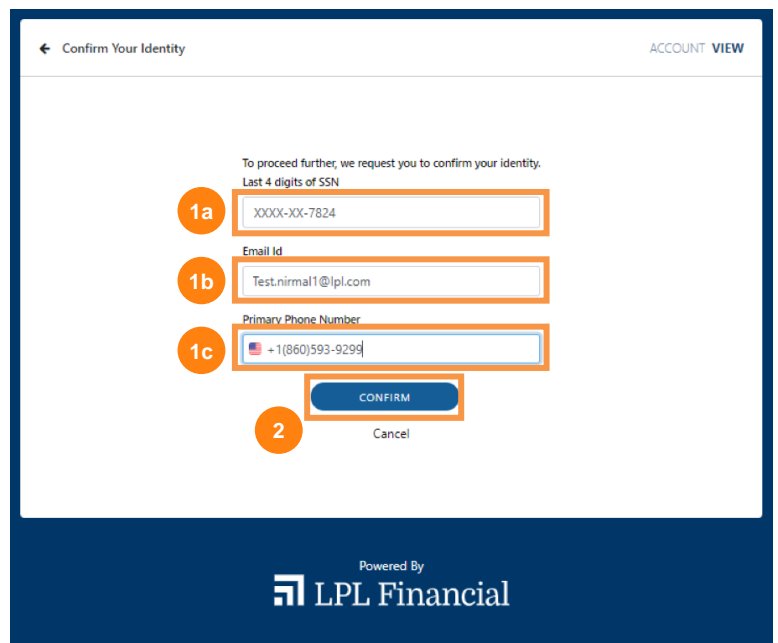
If for any reason the method you chose to receive your one-time password does not work, click the **Try Another Way** link near the bottom of the screen. You will be redirected to the previous screen and allowed to choose a different method to receive your password.



CHANGING YOUR REGISTERED NUMBER

If for any reason you would like to change the registered number associated with your Account View account, follow the steps below.

1. Enter the required information:
 - a. Enter the **last 4 digits of your SSN**.
 - b. Enter your **Email ID**.
 - c. Enter the **Phone Number** you would like to register.
2. Click **Confirm**.



Account View 2.0 | Getting Started Guide

PAPERLESS SETTINGS

From the desktop portal, you can choose to have statements and other account documents delivered paperlessly. To view or change your delivery settings:

1. Click your username in upper right corner of the screen and choose **Settings** from the dropdown menu.
2. From the Paperless Settings tab, select either **Paperless** or **Mail** for the **Statements** and **Additional Documents** categories.
3. Click **Save**.

4. To see which documents fall under **Statements** or **Additional Documents**, click the arrow next to the category type to expand or collapse the list.

ACCOUNT/GROUP NAME	ACCOUNT NO.	CLASS	DELIVERY METHOD
BROKER-RET	XXXX-6791		
SWM1-NR	XXXX-5254		
SWM1-NR	XXXX-5254		
BROKER-RET	XXXX-2125		
BROKER-RET	XXXX-7092		
OUTINV-RET	XXXX-9375		Paperless
OUTINV-RET	XXXX-9375		Paperless



This material was prepared by LPL Financial, LLC.

Securities and advisory services offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. To the extent you are receiving investment advice from a separately registered independent investment advisor that is not an LPL Financial affiliate, please note LPL Financial makes no representation with respect to such entity.

**Not Insured by FDIC/NCUA or Any Other Government Agency | Not Bank/Credit Union Guaranteed
| Not Bank/Credit Union Deposits or Obligations | May Lose Value**

