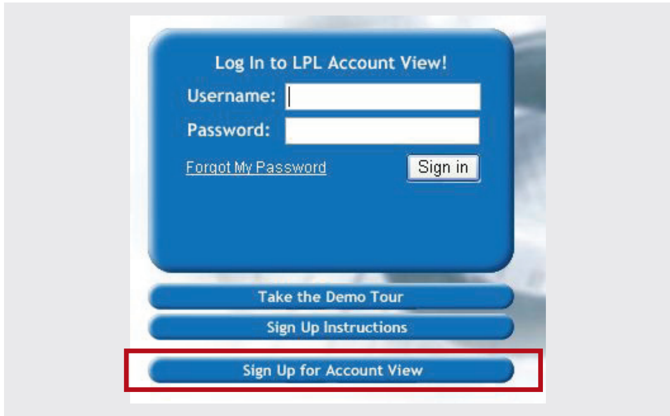
LPL Account View

Instructions for setting up your online portfolio access

Step 1: Sign Up for LPL Account View

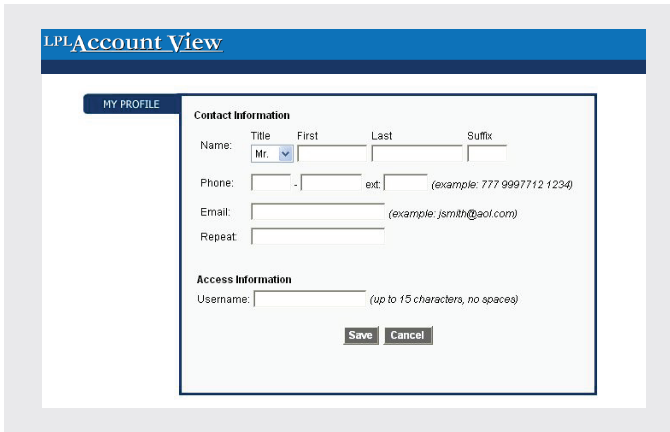
Click on the **Sign Up for Account View** button on the LPL Account View Log In screen. When "Account View Authorization and Terms of Use" agreement displays, read and select the **I accept the Terms and Conditions** option, which is located at the bottom of the screen. Then select **Continue.**



Complete the My Profile Screen

Enter your name, phone number and email address. Choose a username and make a note of it before clicking **Save.** An email with a temporary password will be sent to you immediately.

Click **Continue** on the notification screen indicating that your temporary password has been sent.



Step 2: Log In Using Your Temporary Password

Check your email for your temporary password. Click on the link within the email to access LPL Account View and enter your temporary password. Immediately you will be asked to create a new password. Be sure to make a note of this password and store both your username and password securely.

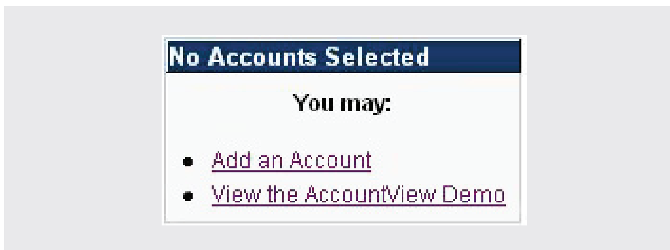
Step 3: Adding and Activating Your Accounts

Now that you have signed up for LPL Account View, you are ready to add and activate your accounts.

Adding Accounts

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.

To begin adding accounts, click on **Add an Account.**



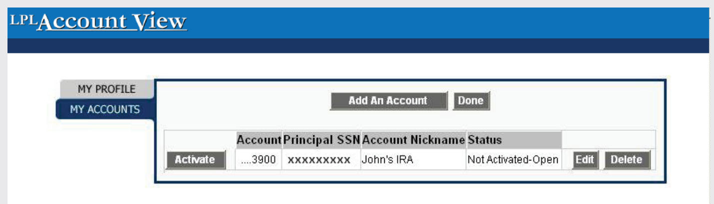
(Step 3 continued)

Enter your account number, Social Security number or Tax ID number and nickname for the account, then click **Submit.**

Continue to add accounts by clicking on **Add An Account.**

When you have finished adding all of your accounts, click **Done.** A letter from LPL Financial will be sent to you in the mail on the next business day with an activation code. Once you receive the letter, follow the instructions below under “Activating Your Accounts.”

If you would like your accounts activated immediately, contact your financial advisor.

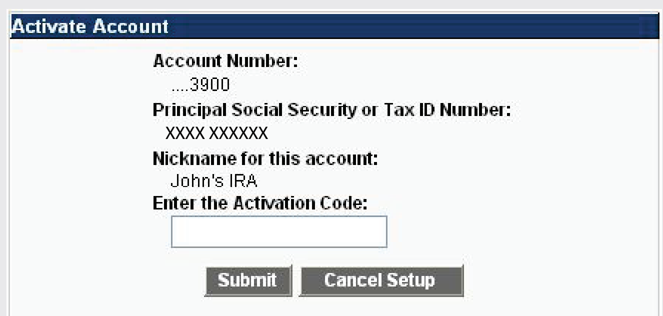


Activating Your Accounts

Once you receive the activation letter from LPL Financial, use the codes to activate your accounts.

Click on **My Profile, My Accounts** and select **Activate** next to the appropriate account. Enter the activation code and click **Submit.**

Click on **Home** to view your account summary.



Go Green! Enroll in FREE Paperless Statements

Go Green! paperless statements

Once you have experienced the ease of reviewing your statements and trade confirmations online, you may want to consider **Going Paperless**. 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.

To **Go Green**, simply click on the **Go Paperless** button in the top header in the LPL Account View and follow the steps.

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