ACCOUNT VIEW

Getting Started with Account View

1. Activate your profile



You'll receive an email from **LPL Financial: Account Notification** with a link to activate your new Account View Profile



Verify your identity with personal information to activate your profile and set up a password



You're redirected to log in via web where you'll enter a one-time passcode sent to your registered phone for the initial login

2. Set up the mobile app



Download the app from the App Store or Google Play by searching for "**LPL Account View**"



Enter a one-time passcode for the initial login and set up a new passcode or Face/Touch ID for future access



If you'd prefer not to use Face/Touch ID, you'll be asked to enter a one-time password for each login along with your credentials

Profile activation troubleshooting

Where do I start? Begin by activating your profile through the link in your activation email first. Your profile must be activated before your accounts are accessible in the mobile app.

Does the activation email download the mobile app? Clicking the email activation link from a mail app on your phone does not automatically download or open the mobile app. Once you have activated your profile via the web, download the mobile app from the App Store or Google Play.

What are my secure access options for the app? You can choose to use biometrics like FaceID or fingerprint to log into the mobile app to avoid entering a one-time passcode for each login.

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