

# ACCOUNT VIEW 2.0

## How-to Go Paperless Guide for Investors

1. Login in to your account at [myaccountviewonline.com](https://myaccountviewonline.com).
2. At the top of the page where it says "Go Paperless" click on it.

ACCOUNT NICKNAME / NUMBER	CURRENT BALANCE	DAY CHANGE (\$)	DAY CHANGE (%)
> John's Taxable 1926	\$110,859.50	\$110,859.50	N/A
> John's Roth 0395	\$124,855.24	\$124,855.24	N/A
TOTALS	\$235,714.74	\$235,714.74	N/A

3. From there you can choose to either go 100% paperless for all eligible documents or pick and choose what you receive paperless and by mail delivery.

**Paperless Settings**

By selecting paperless all available documents will be stored for you in the documents tab and you will receive an email notification letting you know when have a new one to access.

- Statements**  
Individual and combined monthly and quarterly statements for accounts held through LPL Financial
- Additional Documents**  
Trade Confirmations, Prospectus & Shareholder Communications and Client Letters for all LPL accounts
- Tax Forms**  
Account tax documents including: 1099 Consolidated, 1099R, 5498, and more

Cancel SAVE

**FAQ's**

**Please Note:** Despite paperless selection made here, you may still receive mail from third parties

**Did you know?**  
Make it easier to keep your letters organized by going paperless. With paperless letters you'll have access to up to 18 months of letters online without all the clutter.

[Electronic Statement Terms & Conditions](#)

**My Client Information**

**TEST TESTER**  
1055 LPL WAY  
SAN DIEGO CA 92117  
[Additional addresses](#)  
(925) 237-1067  
invview\_10@qalpl.com

**Additional Contacts**  
Users will receive email notifications of posted documents but will not have access  
LPLTSHD@GMAIL.COM  
robert.raab@lpl.com

This material was prepared by LPL Financial

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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
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