

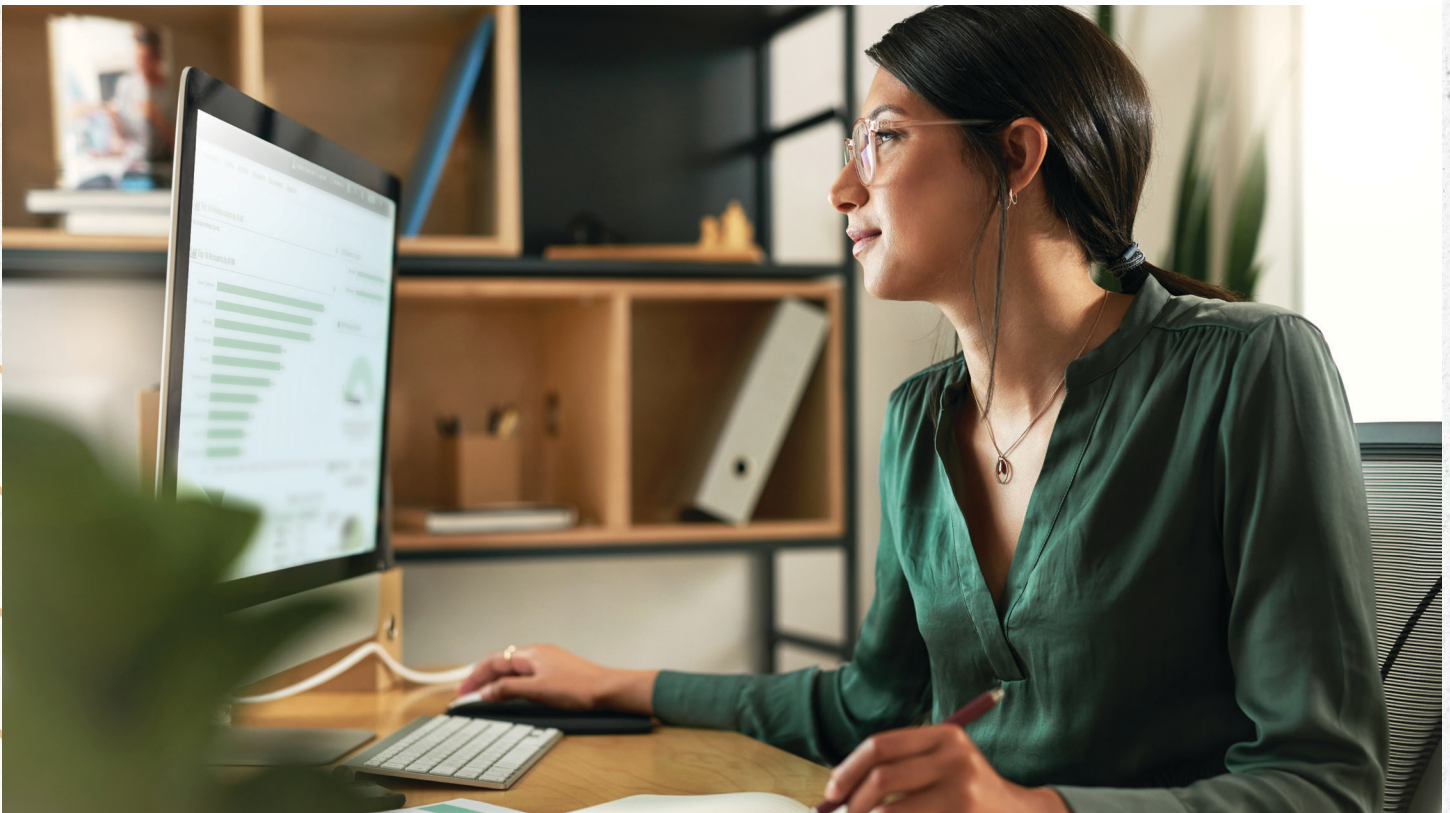
Digital Tools

Tools to help you manage your wealth

At LPL Wealth Advisors Group, we're committed to helping you feel confident about your financial future. We provide personalized guidance and tailored strategies, delivered through a distinctive and client-centered experience.

Our approach provides convenient, real-time access to your accounts, along with updates and progress tracking on your terms—through digital tools, conversations with your advisors, or both.

We encourage you to use the digital tools below to **access your accounts online** or through the **mobile app**, **enroll in paperless delivery** for enhanced security, and choose the level of connectivity that works best for you.



LPL WEALTH ADVISORS GROUP

Digital Tools

Your Data

Account View

Account View is your client portal, giving you access to your accounts, performance, statements, secure documents, and a view of how you are trending toward your financial goals. It's also a way to access financial proposals when working with one of your advisors. Account View is available for desktop and mobile devices.

Set up online access by scanning the QR code below or visiting MyAccountViewOnline.com and click "Sign Up." From there you will input your information to locate your account. Once you've activated your Account View profile, you can download the mobile app. Search "LPL Account View" on the App Store for iOS and Google Play for Android devices. Next, log in using your email address and password from when you created your account. You'll get a text message with a code to register the app the first time you log in.

Scan to enroll:



eSign Documents

Adobe eSign and DocuSign are "paperwork" technologies that offer fast, easy, and secure processes to share sensitive documents digitally. When needed, we can send documents for you to sign at your convenience accessible on either your desktop or on your smart device. After signing, both platforms will send confirmation emails with the ability to download and view signed documents.

Paperless Documents

Switching to paperless documents and online statements may help prevent identity theft from stolen mail. Our digital electronic document tools help ensure sensitive items are kept secure and accessible to you any time. Log into Account View to manage your paperless settings.

Your Team

Schedule time with your advisor

We utilize online scheduling tools making scheduling meetings with our team easy.

When working with one of your advisors, they can share a link allowing you to select appointment times that work best for you. If you want to reschedule, revisit the link in your confirmation email and update the meeting time.

Stay Connected

When saving and investing for your goals, it's important to have comprehensive information available to you to help you make informed decisions. LPL's digital tools provide 24/7 access to your portfolio information, financial plan, and important documents. In addition, you can email us or call to speak directly with one of your financial advisors.

Monday - Friday, 9 a.m. - 7 p.m. EST

(855) 575-9293

LPLWealthAdvisorsGroup.com

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Not Bank/Credit Union Guaranteed

Not Bank/Credit Union Deposits
or Obligations

May Lose Value