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
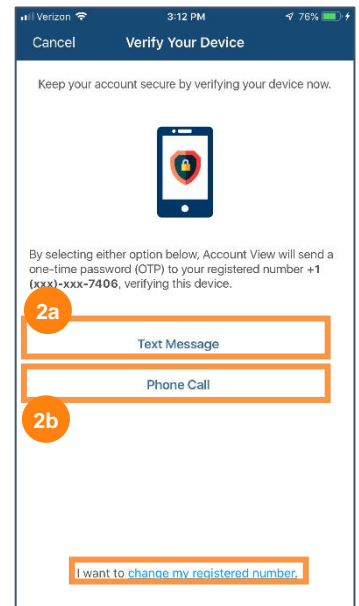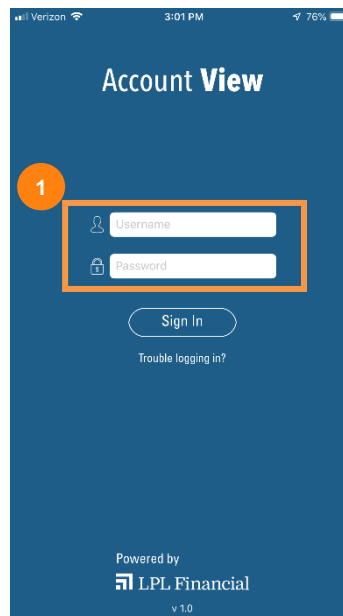
Information or Note

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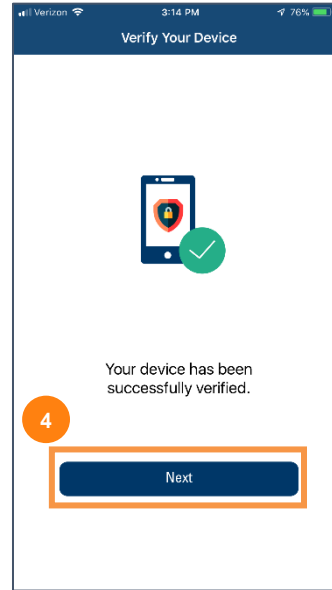
If for any reason the method you chose to receive your password does not work, tap the **Try Another Way** link near the bottom of the screen. You will be redirected to the previous screen and allowed to choose a different method to receive your password.

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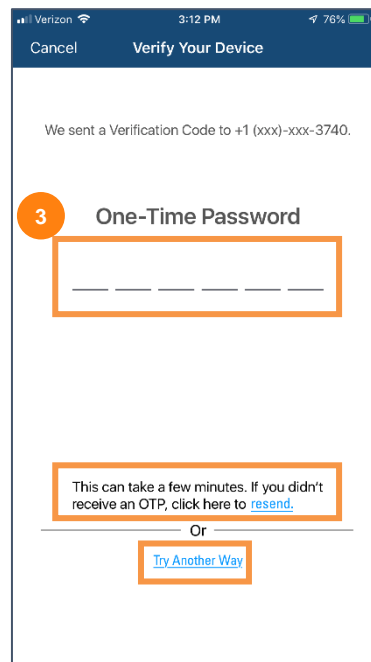
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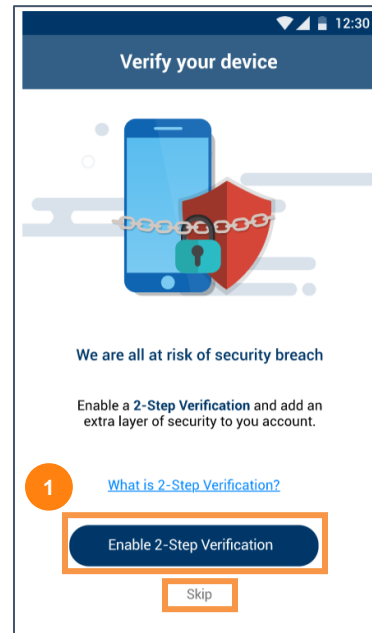**4.** Click the **Next** button to continue.

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.

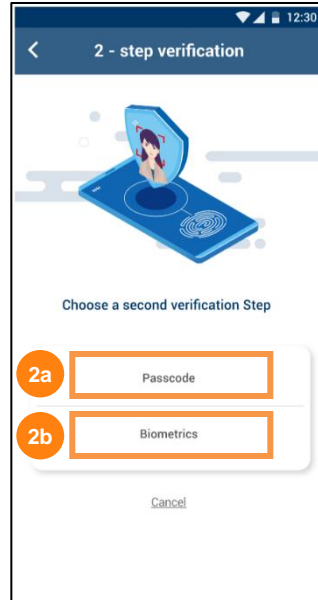**1.** Click **Enable 2-Step Verification**.

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.

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.

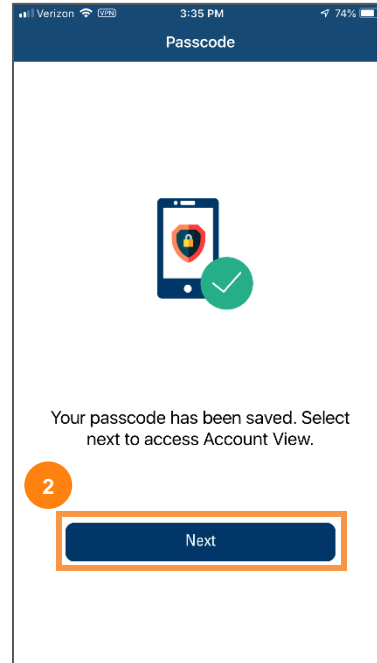**Two-Step Verification Using Passcode**

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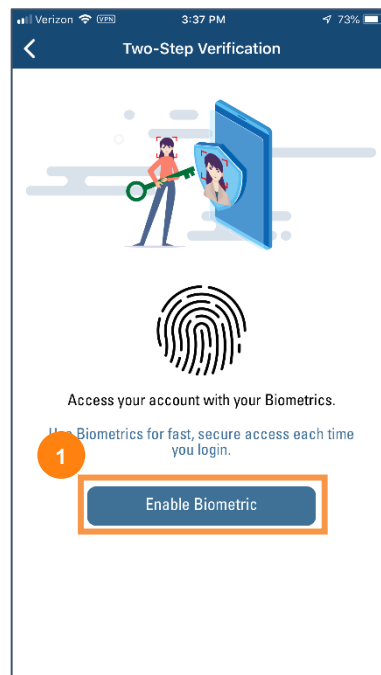
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2. Click the **Next** button to continue on to Account View.

Two-Step Verification Using Biometrics

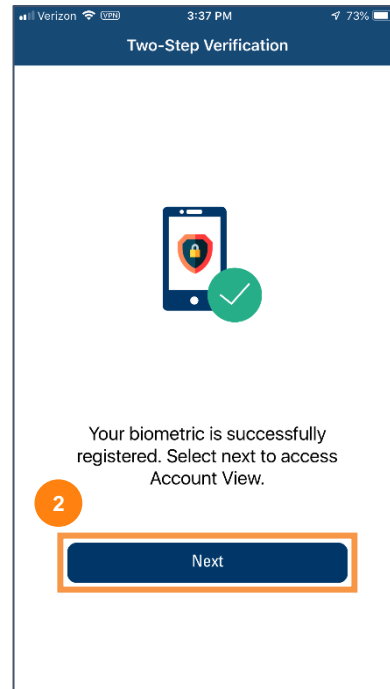If you choose the Passcode option as your second type of verification, you are guided through the following steps:

1. Tap **Enable Biometric**.
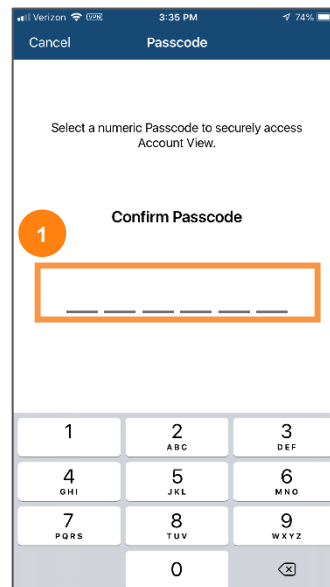
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2. Click the **Next** button to continue on to Account View.

VERIFYING YOUR ANDROID DEVICE

The process to complete two-step verification on your Android device begins by opening and signing in to Account View.
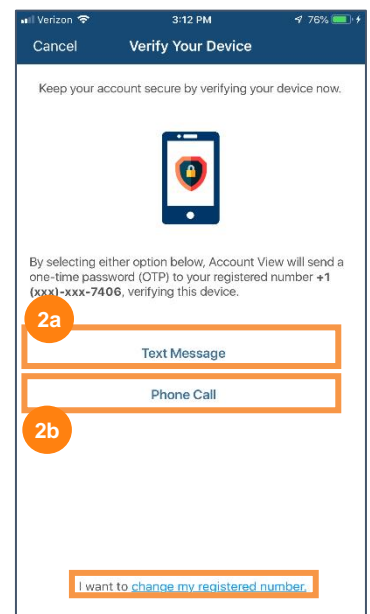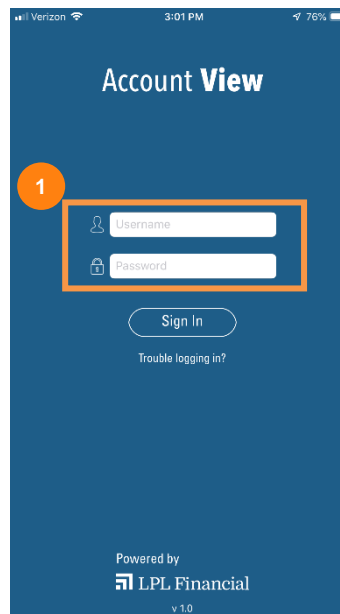
1. Sign into Account View using your existing Account View username and password.

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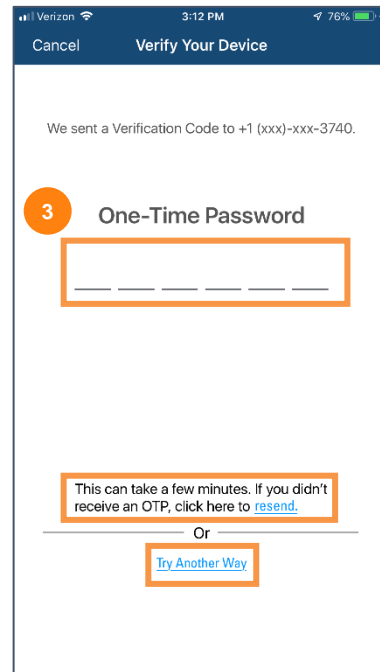
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**3.** Enter the password provided to you via text message or phone call.

ⓘ 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.

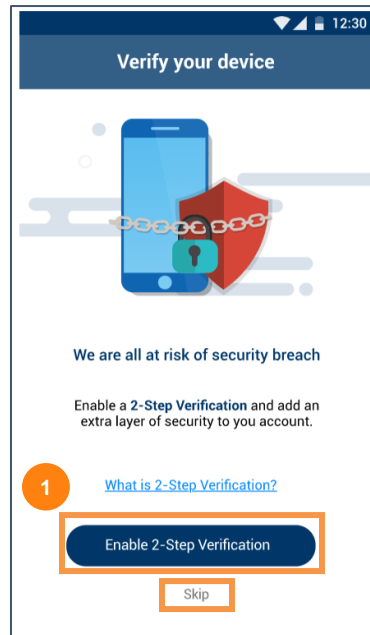**4.** Click the **Next** button to continue.
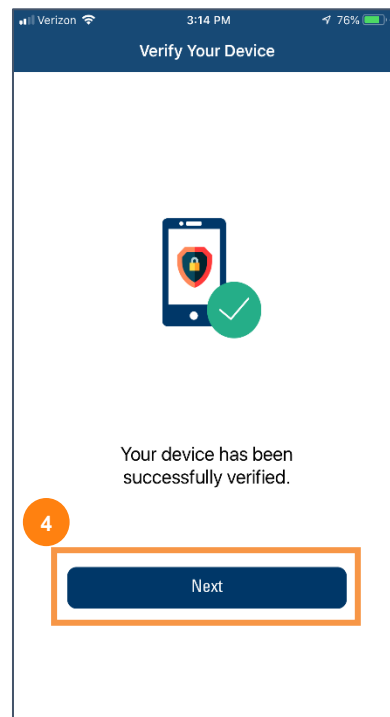
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The next step is to enable 2-Step Verification. Two-step verification adds an extra layer of security to your account. This section will walk you through how to complete the verification process.
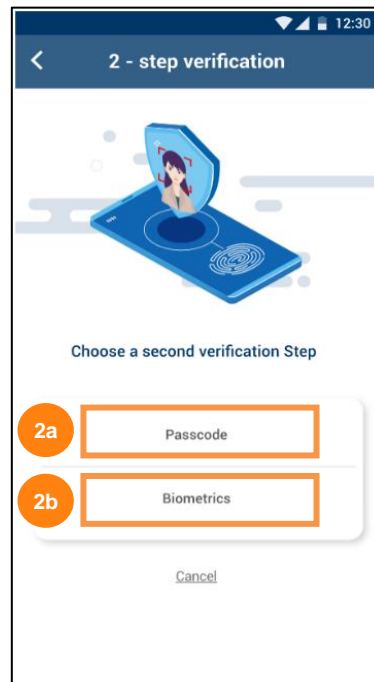
1. Click **Enable 2-Step Verification**.

⚠️ 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.
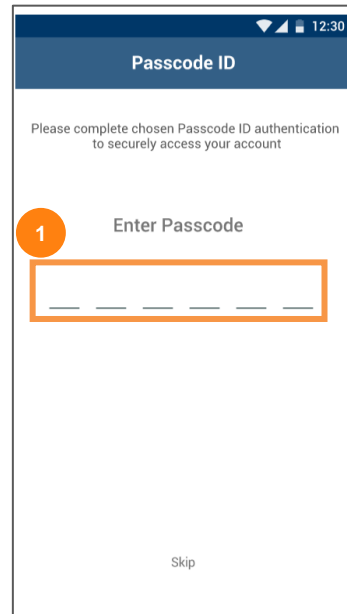
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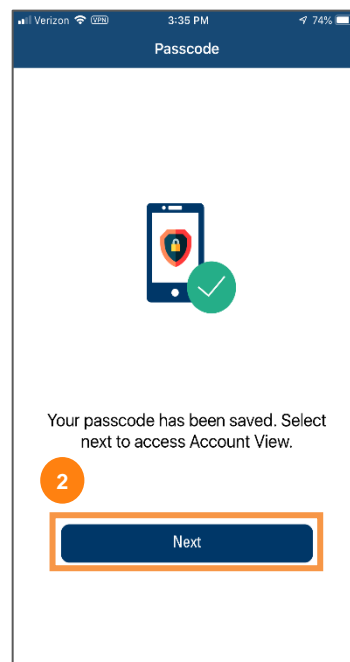
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Two-Step Verification Using Passcode

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.

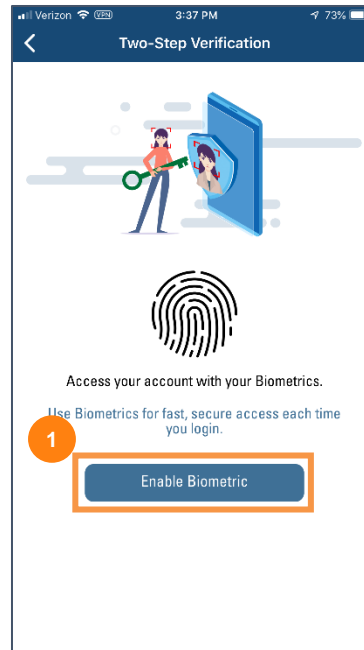2. Click the **Next** button to continue on to Account View.

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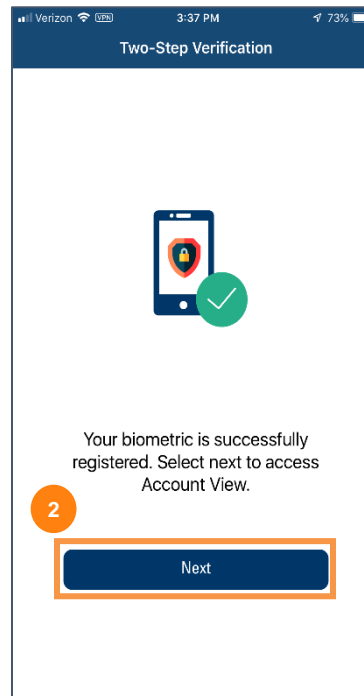# Account View 2.0 | Getting Started Guide

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.

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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.

   (i) 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.

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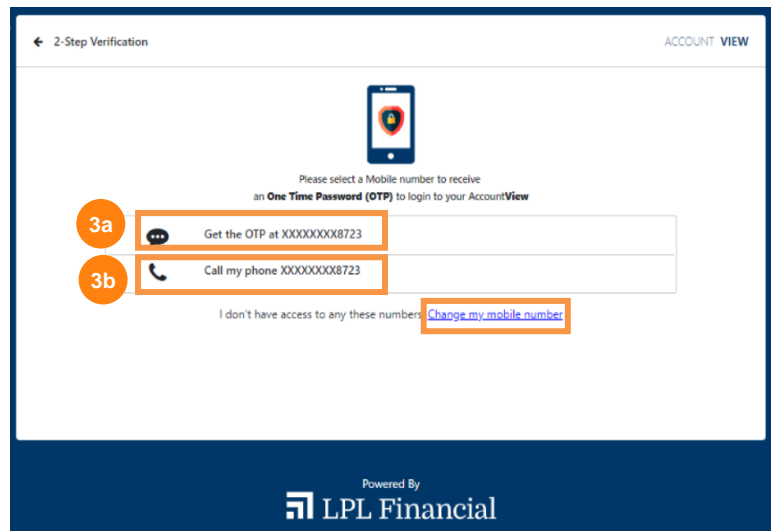
4. Enter the password provided to you via text message or phone call.

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.
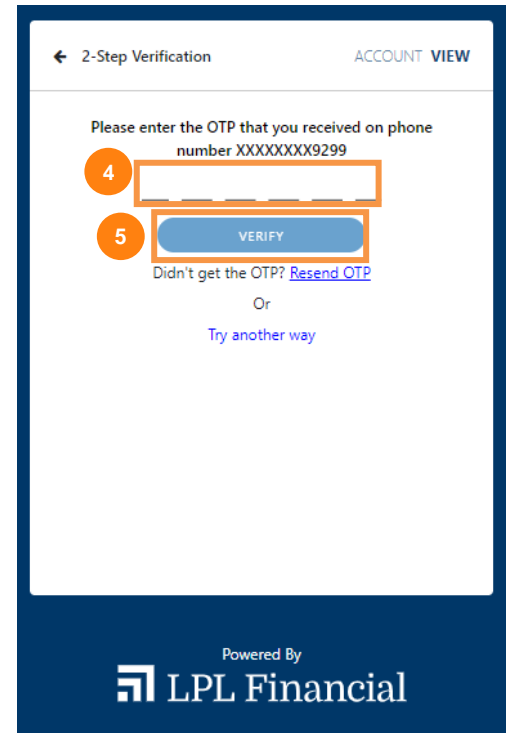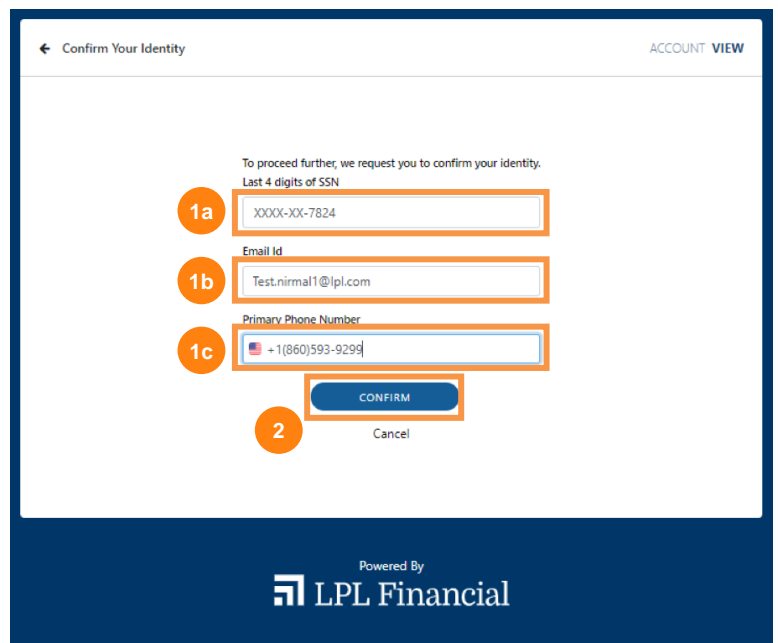
CHANGING YOUR REGISTERED NUMBER

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.**

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.

This material was prepared by LPL Financial, LLC.