ACCOUNT VIEW
Powered by LPL Financial

your legacy, our focus.™
LEGACY WEALTH PARTNERS
www.YourLegacyOurFocus.com

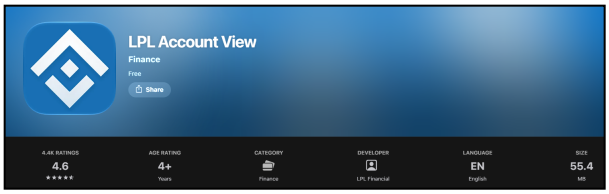
Accessing Your Legacy Wealth Partners Investment Portfolios On the Go

Account View is also available as a free mobile app for your smartphone or tablet. The **LPL Account View** app gives you fast, secure access to your accounts, statements, and documents from wherever you are. Follow the steps below to get started.

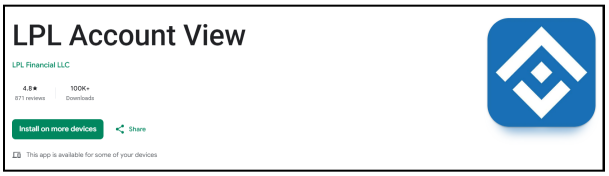
Step 1: On your device, open the **App Store** (iPhone or iPad) or the **Google Play Store** (Android).

Step 2: Search for **LPL Account View** and download the app. The developer is listed as *LPL Financial*.

Apple App Store (iPhone / iPad)



Google Play Store (Android)



Step 3: Open the app and log in using the *same email address and password* you use at accountview.lpl.com.

Step 4: The first time you log in, you will receive a one-time code by text message. Enter the code to register your device.

Step 5: For quick and secure access going forward, enable **Face ID**, **Touch ID**, or fingerprint login when prompted.

What you can do in the app

- Track your total portfolio in a single location and see how its value changes over time.
- Review your allocation across asset classes.
- View account documents, including statements, trade confirmations, and tax forms.
- Enroll in paperless delivery and manage your document preferences.
- Get investment research and daily market updates.

If you have difficulty downloading the app or logging in,
please contact your Legacy Wealth Partners Team at Support@YourLWP.com.

Advisory Services offered through LPL Financial, a registered investment advisor and separate entity from Legacy Wealth Partners

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