

# ACCOUNT VIEW 2.0

## How-to Go Paperless Guide for Investors

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

Appleseed Investments As of Feb 15, 2022, Market Close **2** Paperless Status TEST TESTER

**PORTFOLIO OVERVIEW**

BALANCE MAR 01, 2021  
N/A

TODAY'S CHANGE MAR 01, 2021  
\$0.00

LPL ACCOUNTS AS OF MAR 01, 2021 Change See All Value  
No Data Available

Totals \$0.00 \$0.00

**TOP POSITIONS**

Asset	Change (\$)	Value (\$)	As Of (\$)
No Data Available			

**RECENT ACTIVITIES**

No Data Available

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.

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Paperless Settings Account Settings Primary Contact

**Take your LPL account documents paperless.**  
All your LPL account documents in one easy to locate place with easy access and quick download. **3** LET'S GO PAPERLESS

**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 **3**

**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\_1@qapl.com  
**Additional Contacts**  
Users will receive email notifications of posted documents but will not have access  
LPLTSHD@GMAIL.COM  
robert.raab@lpl.com

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