

ACCOUNT VIEW 2.0

How-to Go Paperless Guide for Investors

1. Login in to your account at 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.

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

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
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This material was prepared by LPL Financial

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