BACK COVE FINANCIAL
Honest • Independent • Experienced

Account View

- Account View is LPL's secure, digital platform for investors that will replace Investor360°.
- You will receive new account number(s) as part of the conversion. These account numbers should be provided to any third parties that you have periodic withdrawal or deposit instructions established with, such as your bank or the SSA.
- After conversion, you will receive access to view your accounts in Account View. I'll share more information with you about this process closer to the conversion date.
- Access to the mobile app will be available after Account View access is established by downloading the LPL Account View mobile app and logging in with your email address and password. You'll get a text message with a code to register the app the first time you log in.
- During market hours, prices and values are updated in Account View every 20 minutes. Intraday transaction information may take up to an hour to appear in Account View.
- You will be able to see all the accounts in your household in Account View, if desired.
- Account View is available on all major browsers (e.g., Chrome, Firefox, and Safari). Chrome is the preferred browser.

Account View Video

Learn about the key features you can expect after conversion. This video provides a simple, visual walkthrough of the new experience, helping you become familiar with how your accounts will be viewable after conversion. If the link is not working for you, please check our latest newsletter or contact your advisors team to view the Account View platform video.

View Video