ACCOUNT VIEW - CLIENT GUIDE

Creating an Account View Profile

To create an Account View profile, complete the following steps:

1. From the Account View home page, choose **Sign Up** within the *New? Sign up for Account View!* section.
2. Enter your email address, phone number, last four digits of SSN, and zip code.
3. Choose **Find Me** to be located in the system.
4. When the user is found, the website prompts you to create a password. The username is auto-generated based on the email address provided.
5. Once prompted, accept the terms and conditions and choose a multi-factor authentication method. A one-time passcode is called or texted to your device.
6. Once multi-factor authentication is fulfilled, you are redirected to the Account View login page and can log in.

Logging into Account View

Clients access Account View 2.0 or Account View legacy from their mobile or desktop browser. Account View 2.0 has a corresponding 2.0 application available for download from mobile app stores.

To log into Account View, complete the following steps:

1. From the Account View home page, enter your username and choose **Next**.
2. Once prompted, enter your password.
    - Account View 2.0 requires a method of multi-factor authentication after entering your password (i.e. passcode, thumbprint, facial recognition, etc.).

Forgotten usernames can be recovered by choosing **Trouble Logging In?** on the Account View home page.

Resetting Password

To reset your Account View password, complete the following steps:

1. From the Account View home page, enter your username and choose **Next**.
2. Once prompted, enter the last four digits of your SSN.
3. After the system verifies that the information matches, you are prompted to send a one-time passcode to the phone number on file for verification.
4. Once verified, you can reset your passcode.

Updating or Adding an Account to the Client Profile

Consult your financial professional or their office to update or add an account to your profile.