Access account view online through myaccountviewonline.com using your PC, mobile app, or tablet.

1. Go to www.myaccountviewonline.com
2. Select ‘sign up for account view’
3. Enter the last 4 digits of your social security number, account number, and zip code
4. Create your profile by completing the personal information. Scroll down to ‘Manage Accounts’ and select ‘Add Account’ to add other account numbers. Click ‘Continue.’
5. Verify profile information before selecting ‘Create Profile.’

HOME:

- Accounts will be listed with current market value
- Asset Allocation chart
  - May view according to account, account type, asset class, or security type
- Value Over Time graph
  - Graph does not display portfolio performance, only values on specific dates.
  - May view year-to-date, all available, last 12 months, previous year, or a customized date.

ACCOUNTS:

- Select an account to view Asset Allocation, Value Over Time, and Balances
- Zoom in/out of Value Over Time to see specific dollar ranges.

TRANSACTIONS:

- Search transactions by date range, security type, transaction type or symbol
- Click the ‘play’ arrow beside each account to view detailed list of transactions

STATEMENTS:

- Search by monthly statements, advisory performance reports, tax statements, or trade confirmations
- Go Paperless Icon on the right side of the screen:
  - Settings>Go Paperless>Select each statement type to enable/disable paperless statements.
  - Settings>My Settings>select options to view on your statement