

# Account View My Documents

## User Guide Supplement

**My Documents**, within Account View, is your online vault for documents you would like to share with your financial advisor who assists you with your investment decisions. You can use **My Documents** for documents like a 401k statement from your company, a summary document for bank statements, real estate planning documents or even a copy of your driver's license or passport.

With **My Documents**, you can trust that these documents are kept private and confidential, and are held securely in Account View. The following pages are instructions for how to use **My Documents** to upload and access documents.

1

On the home page of Account View, select the **My Documents** tab

Welcome Brandy Portfolio Value: \$23,367.64 \$0.00 Messages Print Settings Help Logout

Initech Financial Advisors Powered by: LPL Financial JIM RODGERS (555) 555-1212 Send Email | Secure Message

Home Accounts Positions Transactions Statements **My Documents** Quote: Enter Symbol Go

Account Summary					
Nickname	Account #	Held At	Value(\$)	Change(\$)	Change(%)
WOLTERS JAY 0002906	000290616	PRUDENTIAL	23,367.64	\$0.00	0.00 %
<b>Total Portfolio Value</b>			<b>\$23,367.64</b>	<b>\$0.00</b>	<b>0.00 %</b>

Prices are delayed 20 minutes. All times are Eastern.

Go Green Green Meter PAPERLESS Statements 100% TO GO Sign Up

Announcements from LPL

In **My Documents**, you can upload documents via the **Upload Document** link  
You can view the uploaded documents by selecting **View**, found under the **Action** column

Welcome Brandy Portfolio Value: \$58,874.52 \$0.00 Print Settings Help

Account View Powered by: LPL Financial Doug Smith Data Center (858) 450-9606 Send Email

Home Accounts Positions Transactions Statements **My Documents** WealthVision Quote: Enter Symbol Go

**Documents**

All Documents

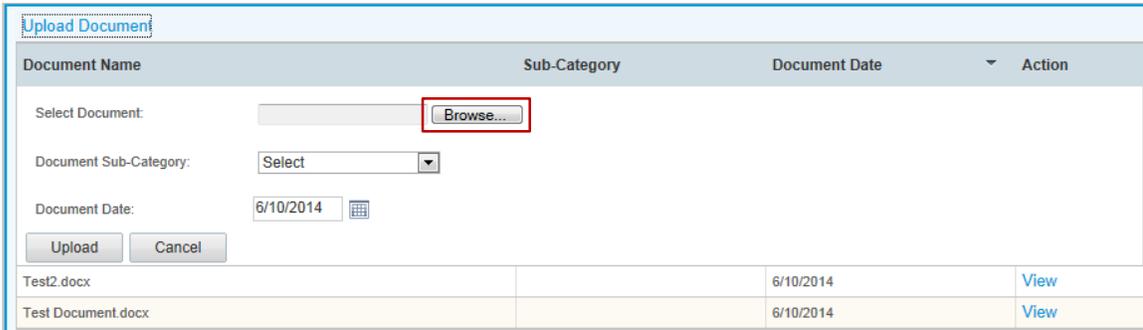
STACIA MAY

**Upload Document**

Document Name	Sub-Category	Document Date	Action
No records to display.			
Account 4479-0262 - STACIA MAY			
Account 5084-7789 - STACIA MAY			
Account 5546-5544 - STACIA MAY			
Account 7578-1793 - STACIA MAY			
Account 5836-7089 - STACIA MAY			
Account 2965-1887 - STACIA MAY			
Bush, Billy			
Account 1769-4301 - BUSH BILLY			

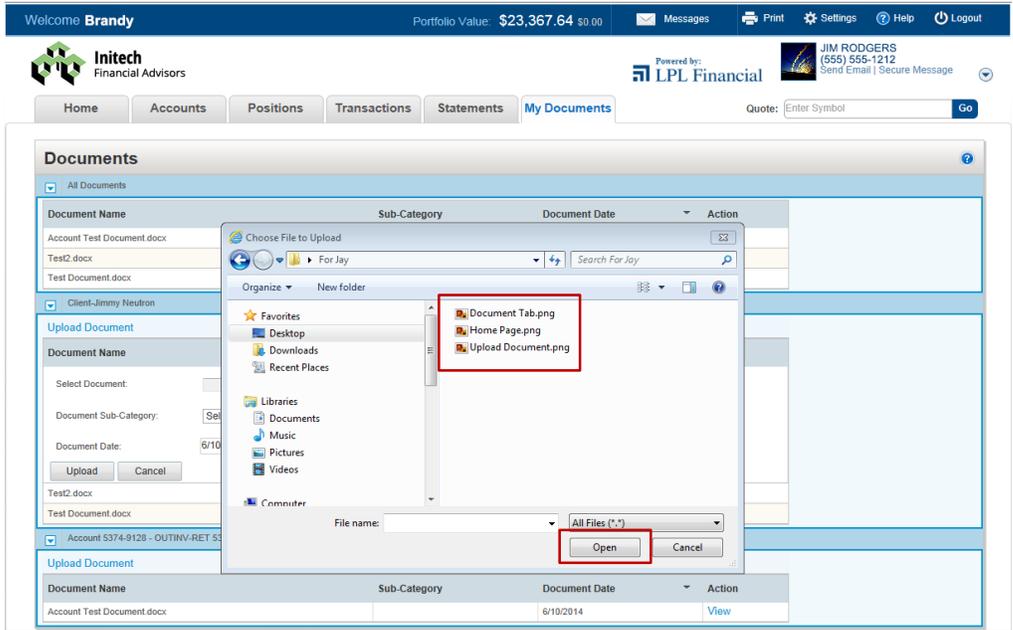
2

To upload a document, select **Upload Document**  
The area expands and you can now **Select the Document** you wish to upload  
Select the Browse button



3

Navigate to the file folders on your computer to find the file you wish to upload  
Highlight the file and select **Open** to upload to **My Documents**



4

Select **Upload** to store the document in **My Documents**

The screenshot shows the 'My Documents' section of the LPL Financial portal. It features a navigation bar with 'Home', 'Accounts', 'Positions', 'Transactions', 'Statements', and 'My Documents'. Below the navigation, there are three document lists. The middle list is titled 'Client-Jimmy Neutron' and includes an 'Upload Document' form. The form has fields for 'Select Document' (with a file path and 'Browse' button), 'Document Sub-Category' (set to 'Client Documents'), and 'Document Date' (set to 6/10/2014). The 'Upload' button is highlighted with a red box, and a 'Cancel' button is also visible. Below the form is a table with columns 'Document Name', 'Sub-Category', 'Document Date', and 'Action'. The table contains two rows of test documents.

5

Once the file upload has completed, the **Upload Successful** prompt will appear  
To view the document, select **View**  
If you wish to delete the document from **My Documents**, please contact your Financial Advisor

This screenshot shows the 'My Documents' page after a successful upload. A green 'Upload Successful' message with a checkmark icon is displayed in a red-bordered box. The 'Upload Document' form is now empty. The table below the form now includes a new document: 'Upload Document.png' under the 'Client Documents' sub-category, dated 6/10/2014, with a 'View' action link. The other test documents remain in the table.