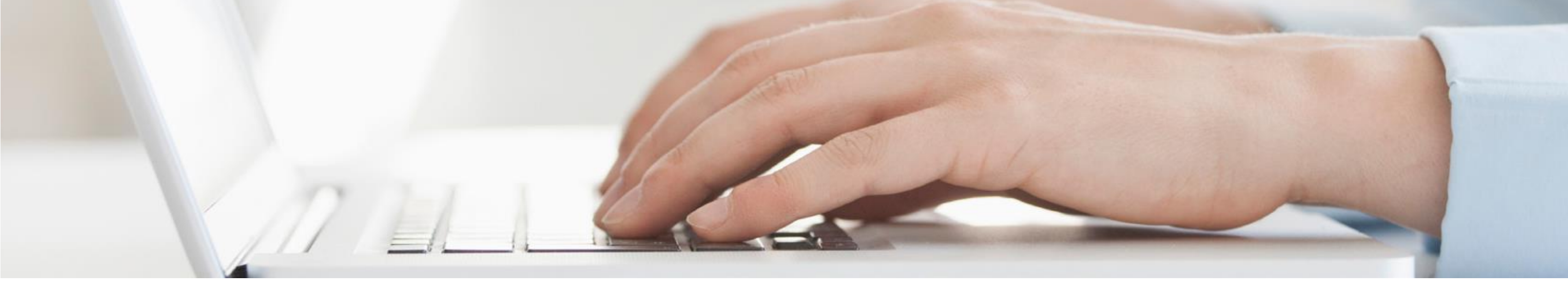
ACCOUNT VIEW

ACCOUNT AGGREGATION BENEFITS

INVESTOR OVERVIEW



What Is Account Aggregation?

The Account Aggregation feature allows you to view all your accounts within Account View, giving you a holistic view of your entire financial picture. Account Aggregation is powered by Morningstar®, an investment-first aggregator that uses industry leading technology to deliver financial account data that you can use. This feature makes it easier for you and your advisor to create a more actionable and personalized plan that considers all aspects of your wealth. By linking both your investment and banking accounts, your advisor will be better equipped to assist you and gauge progress toward your financial goals.

How to Link Your Accounts

The account linking process is simple and can be completed in a few quick and simple steps:

1. Access your Account View account at myaccountviewonline.com
2. Search for your financial institution(s)
3. Enter your credentials
4. Select the accounts to link and share with your advisor (i.e., checking, savings, 401(k), brokerage, Roth IRA, 529 plans)

Account Aggregation Benefits:

- View a complete financial picture and entire net worth
- Receive more actionable and personalized guidance from your advisor
- Gauge progress toward financial health goals
- Increase efficiency and productivity with your advisor

Industry-Leading Technology That Is Safe and Secure

Morningstar prioritizes the security and privacy of your data. Utilizing over 20 years of industry expertise, all information is encrypted so that it remains secure. You also decide which accounts to bring into this picture, giving you complete control over your account data. With that considered, we encourage you to link all your accounts for the most complete financial picture.

Contact your financial professional and start linking your accounts today.

LPL Financial

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