

Account View How-To:

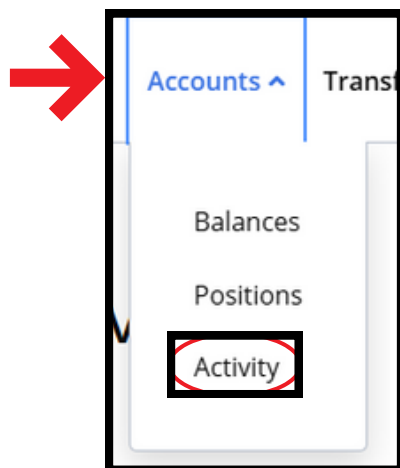
Search For Specific Activity - Retirement Account Distributions

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Start Here: Accountview.lpl.com

1

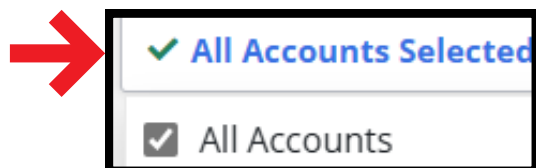
Overview Accounts ▾ Transfer Money ▾ Planning ▾ Documents ▾



- From the AV homepage, click on the 'Accounts' dropdown.
- Choose 'Activity'

2

Activity ☒ All Accounts Selected



- Once on the 'Activity' page, click on Account List dropdown.
- Uncheck 'All Accounts'.
- Choose only LPL retirement accounts (i.e. - IRA).
 - For most accurate income and/or RMD numbers, do NOT choose Roth IRA accounts.
- Click outside of Account List dropdown to update.

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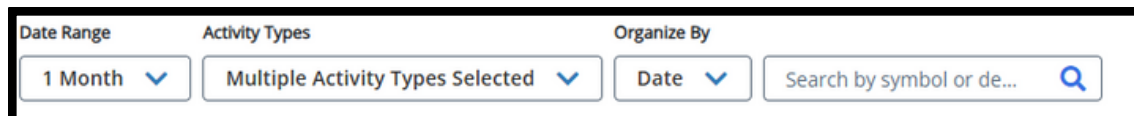
May Lose
Value

Account View How-To:

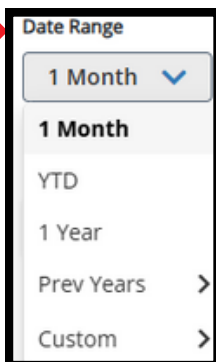
Search For Specific Activity - Retirement Account Distributions

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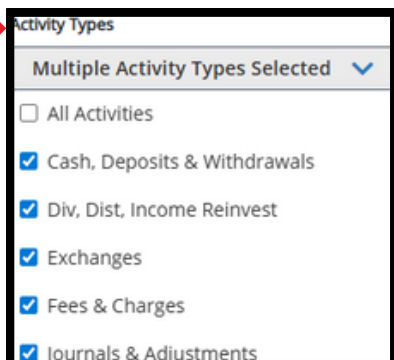
3



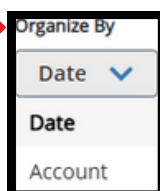
The screenshot shows the top navigation bar with three main sections: 'Date Range' with a dropdown set to '1 Month', 'Activity Types' with a dropdown set to 'Multiple Activity Types Selected', and 'Organize By' with a dropdown set to 'Date'. To the right is a search bar with the placeholder text 'Search by symbol or de...' and a magnifying glass icon.



The expanded 'Date Range' dropdown menu shows options: '1 Month' (selected), '1 Month', 'YTD', '1 Year', 'Prev Years' with a right arrow, and 'Custom' with a right arrow.



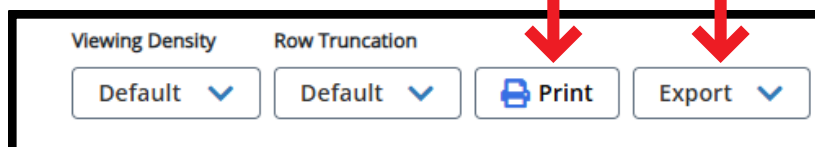
The expanded 'Activity Types' dropdown menu shows 'Multiple Activity Types Selected' (selected) and a list of checkboxes: 'All Activities' (unchecked), 'Cash, Deposits & Withdrawals' (checked), 'Div, Dist, Income Reinvest' (checked), 'Exchanges' (checked), 'Fees & Charges' (checked), and 'Journals & Adjustments' (checked).



The expanded 'Organize By' dropdown menu shows options: 'Date' (selected), 'Date', and 'Account'.

- Choose 'Date Range'.
 - If tracking for income/RMD, choose YTD (year-to-date).
- Click on 'Activity Types' dropdown.
 - Check, then Uncheck 'All Activities'.
- Make these 'Activity Type' selections:
 - Cash, Deposits & Withdrawals
 - Journals & Adjustments
 - Money, Cards & Checks
 - Trf & Adjustments
 - Tax Withheld
- Click on 'Organize By' to sort by Date or Account.
 - 'Date' - looks like a register.
 - 'Account' - click blue dropdown to get activity entries.

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The screenshot shows the bottom navigation bar with 'Viewing Density' set to 'Default', 'Row Truncation' set to 'Default', a 'Print' button with a printer icon, and an 'Export' dropdown menu.

- Now you can choose to 'Print' the Activity report - and/or 'Export' the Activity report in Excel or CSV format.
 - For printing if organized by *account* - choose landscape format and 'Fit to Printable Area'.

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