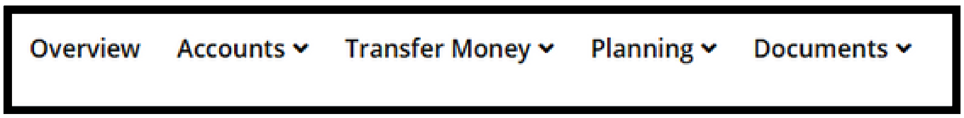
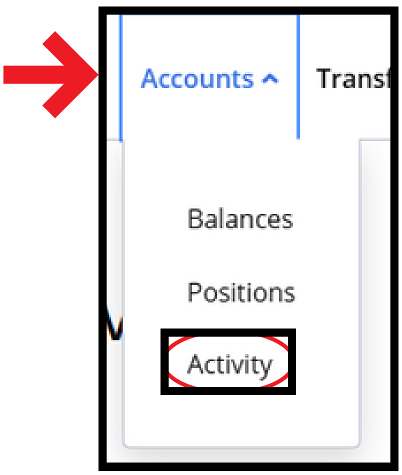
Account View How-To:

Search For Specific Activity - Retirement Account Distributions

Start Here: Accountview.lpl.com

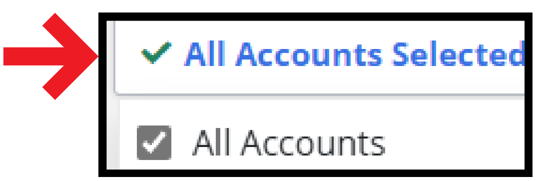
1





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

2



- 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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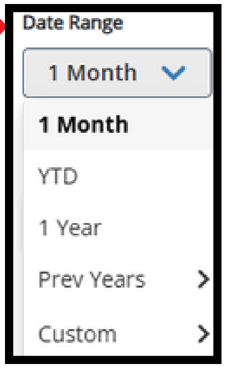
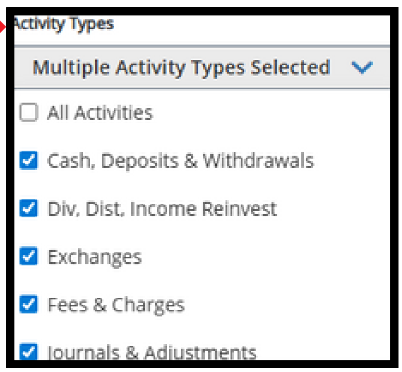
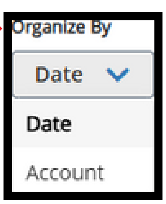
3







- 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.

4

- 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’.