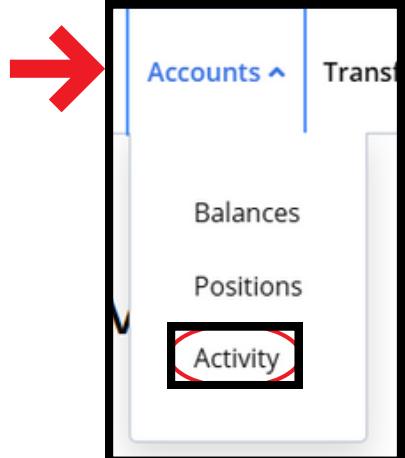
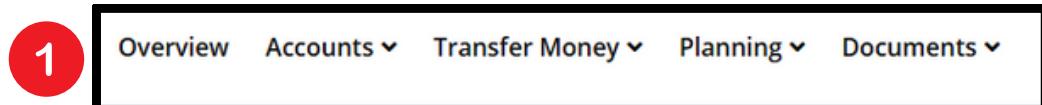


Account View How-To:

Search For Specific Activity - Retirement Account Distributions

Page 1 of 2

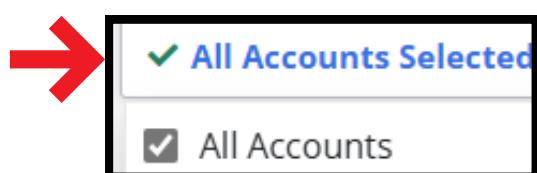
Start Here: Accountview.lpl.com



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



- 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.



Securities and Investment Advisory Services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC

Not insured by FDIC/NCUA or Any
Other Government Agency

Not Bank/Credit
Union Guaranteed

Not Bank/Credit Union
Deposits or Obligations

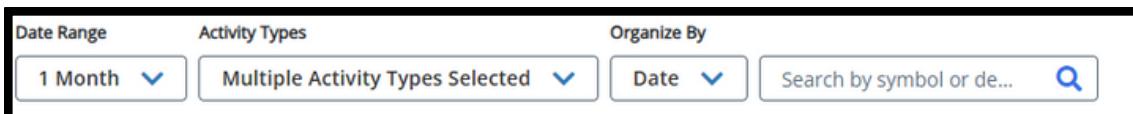
May Lose
Value

Account View How-To:

Search For Specific Activity - Retirement Account Distributions

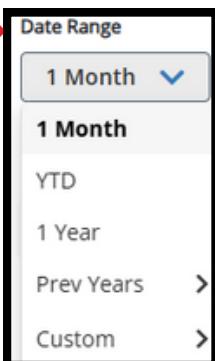
Page 2 of 2

3



Date Range Activity Types Organize By

1 Month ▾ Multiple Activity Types Selected ▾ Date ▾ Search by symbol or de... 



Date Range

1 Month ▾

1 Month

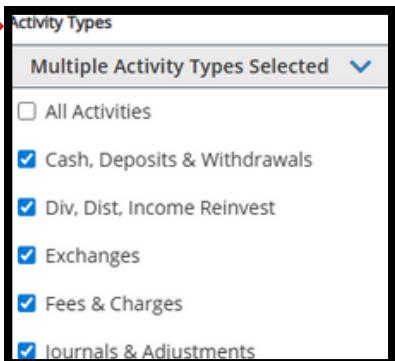
YTD

1 Year

Prev Years >

Custom >

- 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:



Activity Types

Multiple Activity Types Selected ▾

All Activities

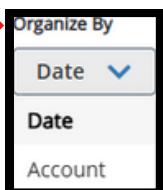
Cash, Deposits & Withdrawals

Div, Dist, Income Reinvest

Exchanges

Fees & Charges

Journals & Adjustments



Organize By

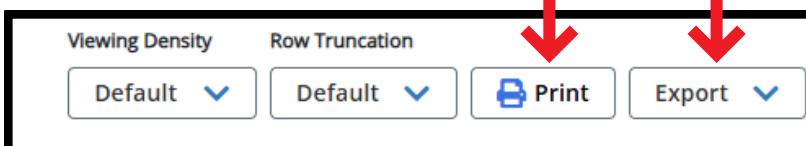
Date ▾

Date

Account

- Click on 'Organize By' to sort by Date or Account.
 - 'Date' - looks like a register.
 - 'Account' - click blue dropdown to get activity entries.

4



Viewing Density Row Truncation

Default ▾ Default ▾  Print Export ▾



- 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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May Lose Value