AdvisorClient®

The Cherry on Top of an Already Sweet Relationship

You already have a great relationship with your financial advisor. Now, take it to the next level with AdvisorClient.com—the easy and secure way to see the big picture when it comes to your investments.

How Going Paperless Can Help Keep You Up to Date

While the physical statements you get in the mail show a snapshot of your investments at one single point in time, AdvisorClient.com helps you connect to your account information anytime, anywhere.

Whether you log in via your desktop or use the mobile app to get account information on the go, AdvisorClient.com can provide secure, easy access to your balances, positions, tax documents, trade confirmations, statements, transaction history and more.

AdvisorClient.com Security Features

Consistent Protection

Your information within the website is private and secured through encryption technology and constant vulnerability scans.

Secure Message Center

Receive important communications through a protected channel—accessible only when you're logged in to AdvisorClient.com.

Self-Setup

You can register for the website yourself, creating a password known only to you.

Mobile Deposit

Use the mobile app to deposit checks remotely—there's no need to mail them in!

TD Ameritrade Institutional

Additional Features

- Quickly search symbols or keywords to get information you need, when you need it
- View information for all your TD Ameritrade Institutional accounts individually or via a combined view
- Access information about individual securities with just one click
- Use the mobile app and your phone's camera to deposit checks easily, quickly and securely
- See your financial advisor's contact information at any time
- Track daily trends and other market activity with easy-to-use tools, such as Market Snapshot
- Review the latest transactions for all of your TD Ameritrade Institutional accounts
- Manage and update your personal information
- Add the customizable dock to larger monitors to get quick access throughout the day
- Keep the information that's important to you in view at all times with the customizable dock

GET THE MOST FROM ADVISORCLIENT.COM

Using the Website

Setting up your login is simple. Just go to AdvisorClient.com, and select "Get started." You'll be guided through a short, easy process to create your user ID and password, attach accounts to your user ID and customize your communication preferences. Then, use the following tips to enhance your experience:

1 Under the My Account menu, you'll find more detailed information about your balances, positions, statements and tax documents. You can also set up watch lists to keep an eye on positions you find interesting.

2 In the Client Services section, you can create custom labels to identify each of your accounts, request that specific accounts be added or removed from view and more.

3 Visit the Apple® App Store® or Google Play™ store to download the AdvisorClient Mobile app. You'll have remote access to many of the great features offered on AdvisiorClient.com, with the added bonus of a remote check deposit feature.

Have questions?

Contact your financial advisor to get more information about AdvisorClient.com.

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