

Subject: Continue receiving your documents electronically

Headline: Create Your Profile to Keep Your E-delivery Preferences

Dear Valued Client,

As part of the integration efforts between TD Ameritrade Institutional into Schwab Advisor Services (Schwab), we are actively working to create consistencies between the two platforms. Beginning with your July 2022 statement, TD Ameritrade Institutional will require you to establish a user ID and password on AdvisorClient® via either the web or mobile to maintain your enrollment in electronic delivery of statements, confirms, and other communications. These changes will apply to existing and any new accounts going forward.

What this means for you

- There will be no impact if you are currently enrolled in e-delivery and have logged into AdvisorClient.
- If you are currently enrolled in e-delivery and **have not** established a user ID and password on the web or via mobile and logged into AdvisorClient **by July 22, 2022**, you will have your e-delivery preferences changed to paper delivery beginning with your July 2022 statements that will be mailed in early August.

How to set up your user ID and password

To create your user ID and password have your account number ready, we will then verify your identity using the phone number you provided when you opened your account. We can either call or send you a text message to provide you with a unique 6-digit code to enter during the set-up process. From there you will be prompted to create a user ID and password.

If your delivery preferences are switched from electronic to paper, you can easily re-enroll in electronic delivery by establishing your user ID and password on [AdvisorClient.com](https://www.advisorclient.com) and managing your electronic delivery preferences. Just visit <https://www.advisorclient.com/login>, scroll to the bottom of the page and select “**Set up my profile**”. Once you are logged in, you can also review your preferences by selecting, **My Profile < Communications Preferences**.

Questions?

If you have questions about AdvisorClient enrollment, please call the TD Ameritrade Institutional technical support team at 800-431-3500, option 4. For any other questions, please contact your Advisor.

Sincerely,

TD Ameritrade Institutional

This is an automated email, and replies will not be delivered. If you have any questions, you can log in to your account and click the "Contact Us" link to write us. If you need to contact TD Ameritrade Institutional for assistance accessing your online account, or for additional help, please call us at 800-431-3500.

TD Ameritrade understands the importance of protecting your privacy. From time to time we need to send you notifications like this one to provide you with important information regarding your account. Please note that if you've elected to opt out of receiving promotional marketing communications from us, containing news about new and valuable TD Ameritrade services, we will continue to honor your request.

TD Ameritrade Institutional, Division of TD Ameritrade, Inc., member [FINRA/SIPC](#), a subsidiary of The Charles Schwab Corporation. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank. ©2022 Charles Schwab & Co. Inc. All rights reserved.

Distributed by: TD Ameritrade, Inc., 200 South 108th Avenue, Omaha, NE 68154-2631.

TDAI 6028 EM 4/22