

INSTRUCTIONS: ACCESSING INSTITUTIONAL CLIENT WEBSITES

TD Ameritrade

1. Go to www.advisorclient.com
2. Enter your UserId: xxxxxxxxxxxx
3. Enter your Password: *(initially, the last 6 digits of your Social Security number)*
4. Answer security questions
5. To change your password, go to the Account Tools menu and click on Change Password

If you do not have a UserID:

1. Go to www.advisorclient.com
2. Click on the "Set up my profile" button in the upper right corner of the page to start the enrollment process
3. Enter your Account Number
4. Follow the instructions to complete the validation process and obtain a security code, etc.

If you are locked out or having difficulty accessing your online account, you may contact Institutional Technology Services directly: 800-431-3500, option #2

Charles Schwab

1. Go to www.schwaballiance.com
2. Enter your Login ID: xxxxxxxxxxxx
3. Enter your Password: xxxxxxxx

If you are locked out or having difficulty accessing your online account, you may contact Schwab Alliance directly: 800-515-2157

