

AdvisorClient.com

Online Account Setup

Steps:

- 1) Go to <https://www.advisorclient.com> in the address bar, click the enter button on your keyboard
- 2) Click on set up my profile (bottom right from the Login button)

Welcome to TD Ameritrade AdvisorClient.com

View all of your TD Ameritrade accounts, track your investments, or review your documents in one place.

Log in to your account.

User ID

Remember my user ID

Password

[Forgot your password?](#)

Log in

First time here? [Set up my profile](#)

- 3) On next screen click on "Get started"

Welcome to TD Ameritrade AdvisorClient.com

View all of your TD Ameritrade accounts, track your investments, or review your documents in one place.

Let's get started.

All you'll need is your new account number to get started. You can also add a mobile number to make your account more secure.

Get started

Enter your account number or user ID

Once we find your account, we will use the phone number you provided when you opened the account to verify your identity.

Account Number (9-digit) or User ID

I would prefer a phone call with a prompt to verify me.

Call me now

or

The phone number I provided can receive text messages. I would prefer a text message.

Text me now

- 5) Put in the 6 digit code that was either texted to you or given to you through the call. Then click on the "Verify" button.

Enter the code that was sent to ***-**-6288 to verify your identity.

Enter the 6-digit code that was sent to you.

Enter your code

Verify

Didn't receive a code? [Try again](#)

6) Create your User ID, password and confirm your password. Then click on submit.

Create your user ID and password

User ID

- ⊗ Must be 4-15 characters
- ⊗ Must have at least one letter
- ⊗ Must **NOT** use special characters other than **hyphen** or **underscore**
- ⊗ Must be unique

Create your password

- ⊗ Must be 8-64 characters
- ⊗ Must have at least one letter
- ⊗ Must have at least one number
- ⊗ UserID and password are not the same

Confirm your password

- ⊗ Passwords must match

Submit

- 7) Next the system will ask if you would like to receive your communication by electronic delivery. If so, please enter your email address, click the confirm box and click on “Save preference”. If you do not want to get electronic communications click on “Skip This”

Go paperless!

Set all communication to electronic delivery by entering your email address.

We will notify you at the email address you give us when a tax document, trade confirmation, statement or secure message is available for any of your owned accounts.

Email address

EMAILTEST@TEST.COM

For electronic delivery, you'll receive an email notice containing instructions for retrieving the document from the TD Ameritrade website. You need a device that can access our website and that can download and open PDF documents in order to access electronic versions of tax documents and some other documents. Your preferences for electronic or paper delivery by mail remain in effect until you change them. If we are unable to deliver emails to you, we will change your delivery preferences to paper delivery and delete the invalid email address. You can change your delivery preference or the address to which we should send documents at any time. You may also change your preference for tax documents to paper delivery online or by sending a letter to:

TD Ameritrade Institutional
PO Box 650567
Dallas, TX 75265-0567

If you change your preference to paper, only documents generated after you make the change are mailed to the mailing address we have on file. If you would like a copy of an existing document mailed to you, please call a Client Services representative at 800-431-3500 to request a paper copy. Electronic copies of tax documents are available for seven years from when they are created. If you close your account, you may not be able to access electronic copies of your tax documents, but you may obtain copies by calling a Client Services representative at 800-431-3500. New documents created after account closing are sent by mail. You will not receive paper tax documents if you sign up for electronic delivery; however, some tax documents may not be available electronically and may be sent by mail.

I confirm my selections for electronic or paper delivery of statements, trade confirmations, and tax documents. If I selected electronic, I understand and consent to the Electronic Delivery of Documents terms.

Save preference

[Skip This](#)

If you have further questions, please contact us.

Telephone: 1.800.431.3500 x4

E-mail: TechServices@TDAmeritrade.com

Our Technology Associates are available Monday - Friday 7:00am to 8:00pm EST.

