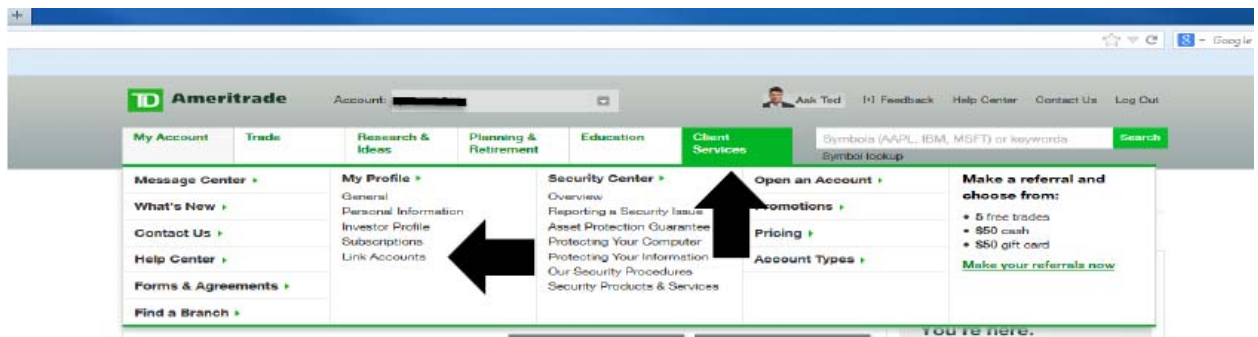


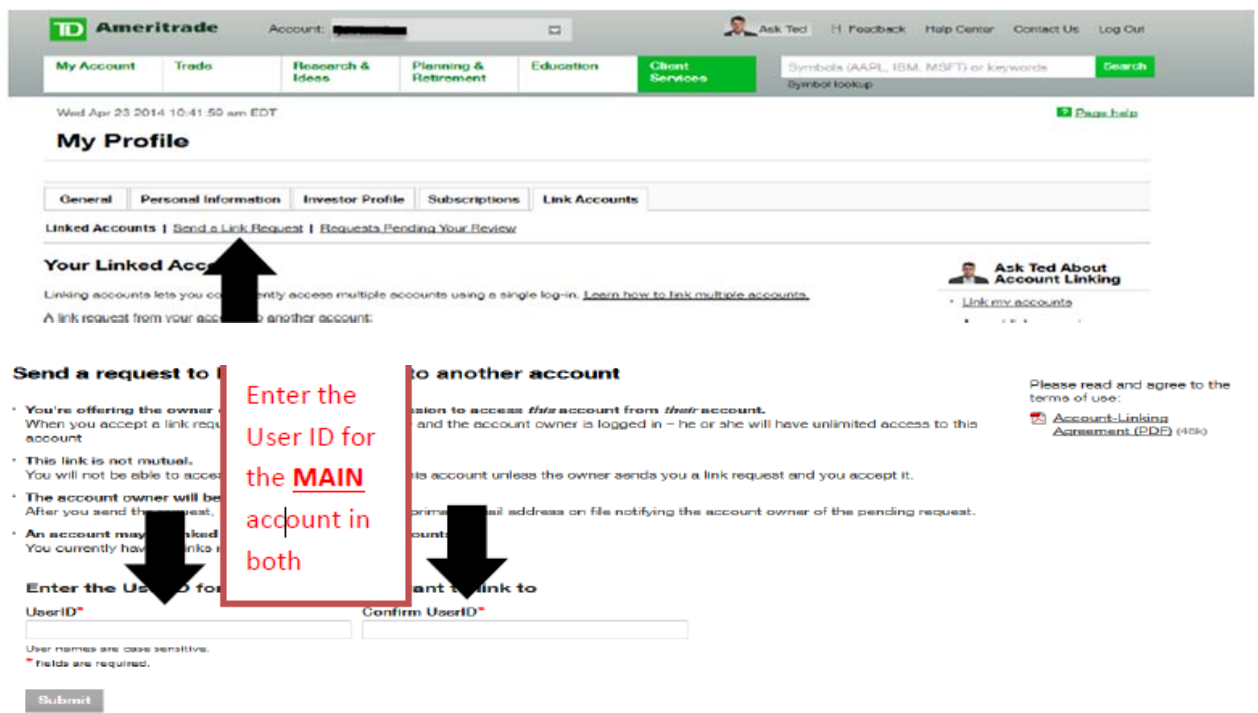
Linking Multiple Accounts at www.tdameritrade.com

How do I link my accounts? To access multiple accounts from your main account, each secondary account must first send a link request back to the main account.

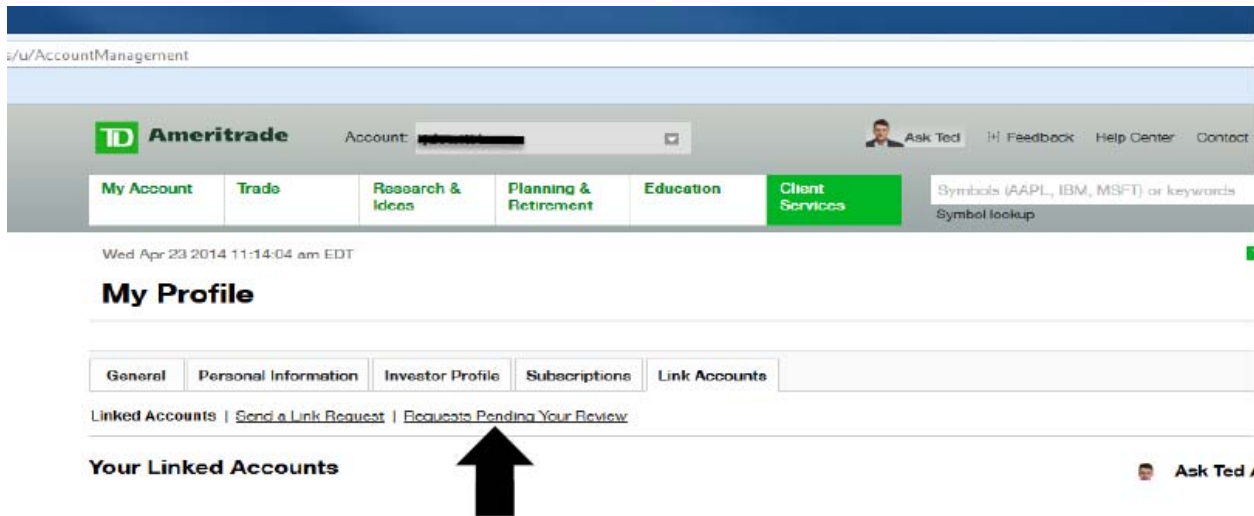
1. First, identify which account you prefer to log in to and remember its user ID (Your user ID is located in the Account pull-down menu at the top of the website). We'll call this your main account. All of the accounts you want to link to this main account, we'll call secondary accounts.
2. Log in to each secondary account and go to **Client Services > My Profile > Link Accounts**. Note: If this is the first time you're using this feature, read and accept the terms of the Account Linking Agreement.



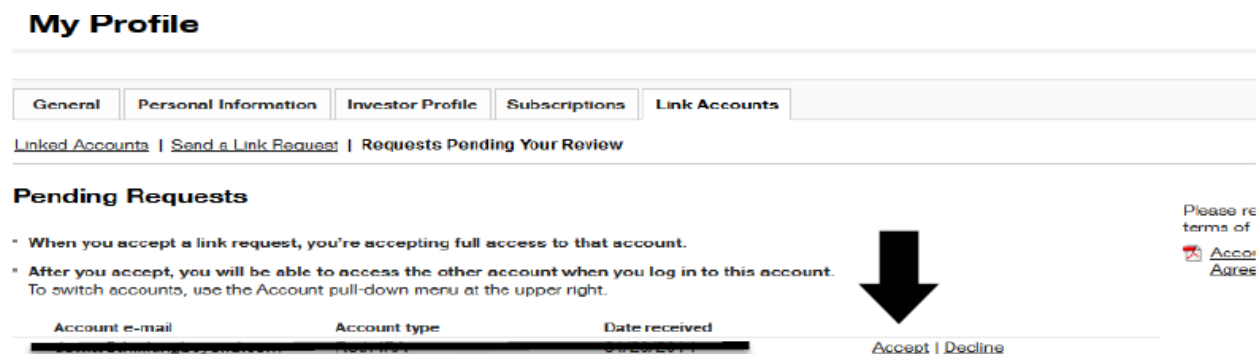
3. From each secondary account, [send a link request](#) to the main account's user ID. Do this from each account you want linked to your main account.



- Once you have selected "Submit" you will receive a message in yellow at the top of your screen stating that the request has been sent.
- If you have additional secondary accounts that you would like to link, repeat steps 1 through 4. Otherwise, continue to step 6.
- Once you've sent a link request from each secondary account to the main account, log in to the main account and [review pending requests](#) to accept the links. This is accessed by going back to **Client Services > My Profile > Link Accounts** then clicking on **Requests Pending your Review**.



- You will then click on the "Accept" button.



- Once you have selected "Accept" you will receive a message in yellow at the top of your screen alerting you that you have successfully linked the accounts.
- You'll then need to logout and log back into the main account to complete the link.

If you have questions about linking accounts, please contact your Operations Manager at Creative Planning at 913-742-7230.