

## **Instructions for logging in to your TD Ameritrade Account**

1. Go to the Wiser web site – [www.wiserinvestor.com](http://www.wiserinvestor.com), click the Client Login drop down and select TD Ameritrade.
2. Click on “First Time Here?” to set up a password and security questions.
3. Please write down your username and password so you have access to it.
4. TD Ameritrade has a safety set up on logins. If you try more than twice to login to your account with either the username or password incorrect, TD Ameritrade will block you out. If this happens, contact Tiffany at [tiffany@wiserinvestor.com](mailto:tiffany@wiserinvestor.com) or 678-905-4450 extension 104 to unblock your account and get a temporary password. You can then change the password after you login with the temporary one.
5. If there are accounts owned by other members in your family that are not showing when you login, please contact Tiffany at [tiffany@wiserinvestor.com](mailto:tiffany@wiserinvestor.com) or 678-905-4450 extension 104. She will get you to sign an “Advisor Client Access Form” and then we can combine all the accounts into one login.
6. If you need to update your email address at TD Ameritrade, we can no longer do this for you. This is a new security measure with TD Ameritrade. We can submit a letter signed by you with your new email address, but this takes 24-48 hours to process. You can also update it when you login to your account or call TD Ameritrade at 1-800-431-3500 and dial ext 3 for technology services.

**PLEASE SAVE THIS FOR FUTURE REFERENCE**