

Self-Directed Brokerage Account (SDBA)

Get Added Flexibility With Single Sign-On And Account Linking

Simplified SDBA Account Management

With the TD Ameritrade Single Sign-On and Account Linking features, managing your SDBA is easier than ever. You get the flexibility you need to stay connected to your brokerage accounts, all in one convenient place. This free service gives hands-on investors, like you, more investment control along with access to award winning trading tools*, robust research, and third-party market analysis**.

OVERVIEW:

Single Sign-On and Account Linking lets you:

- Access your SDBA directly from your company's retirement plan web site using a single sign-on
- Link multiple TD Ameritrade accounts together for simplified account management
- Place trades, monitor account activity, and view brokerage account balances and holdings on one screen
- Manage your SDBA accounts from anywhere using TD Ameritrade Mobile for iPad, iPhone, Android, Blackberry, and Windows Phone



Single Sign-On: One-Click Access to Your Brokerage Accounts

Single Sign-On: One-Click Access to Your Brokerage Accounts

With the TD Ameritrade Single Sign-On feature, you can access your Self-Directed Brokerage Account (SDBA) directly from your retirement provider's web site. Single Sign-On's user-friendly log-in process:

- Eliminates the hassle of multiple log-ins
- Saves you time
- Simplifies account access

You only need to establish your Single Sign-On account once. The next time you log-in to your retirement provider's website, you'll be able to transfer directly to your TD Ameritrade Self-Directed Brokerage Account with one click.

To set up Single Sign-On, follow the steps below:

1 | Click on the **"Self-Directed Account"** link on your 401(k) provider's web site[†]

Log-in screen (fig 2)
For illustrative purposes only.

3 | Click the **"Add Single Sign-On"** button. You'll then be logged directly into your TD Ameritrade Self-Directed Brokerage Account

My Account: Overview screen (fig 4)
For illustrative purposes only.

4 | Once you are logged in, you will see your **"My Account: Overview"** page

[†] Links may vary based on your 401(k) provider's web site. You may be required to answer one of your personalized secret questions if you log-in from an unrecognized computer.

Account Linking: Access to All of Your Accounts in One Place

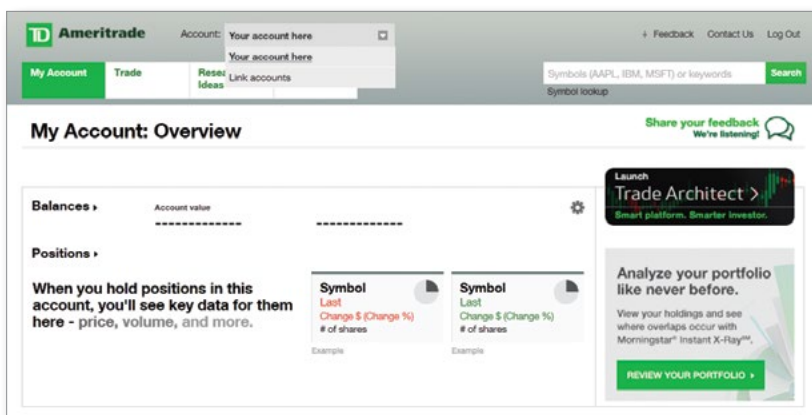
Account Linking gives you convenient access to all of your TD Ameritrade brokerage accounts.

Sign-on once to:

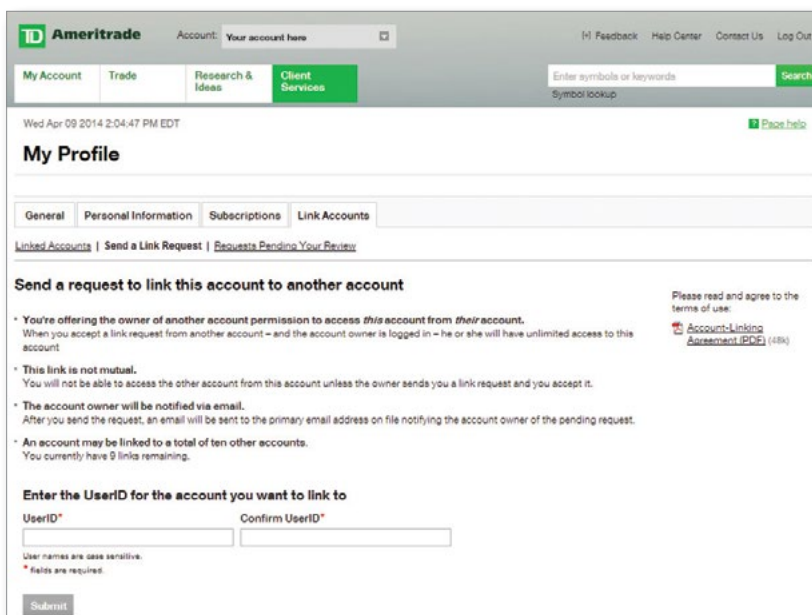
- View holdings and balances across multiple accounts
- Initiate trades
- Track brokerage account history

To link your brokerage accounts, first choose a primary account. This will be the main account you log-in to and then you can access other accounts. Any secondary accounts will send a link invitation to the primary account for approval. **Follow the steps below to link your brokerage accounts:**

- 1 | **Log-in to a secondary account**
- 2 | **Select “Link Accounts” from the Account drop-down menu or from the “Client Services Account Linking” tab**
- 3 | **Read the Account Linking Agreement and click to “Accept”**
- 4 | **Click “Send a Link Request”**
- 5 | **Enter the UserID of the primary account you would like to link to (typically your largest account), then click “Submit”**



Account Linking screen (fig 2)
For illustrative purposes only.



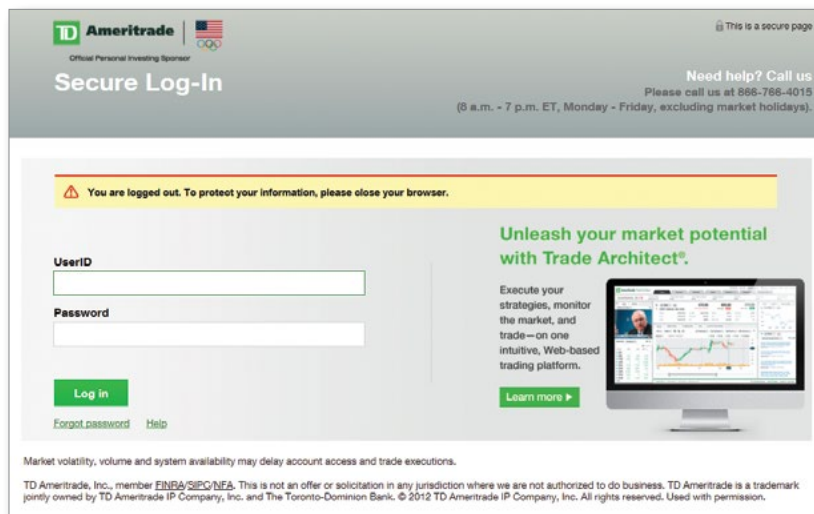
Link Request screen (fig 4)
For illustrative purposes only.

Account Linking: Access to All of Your Accounts in One Place

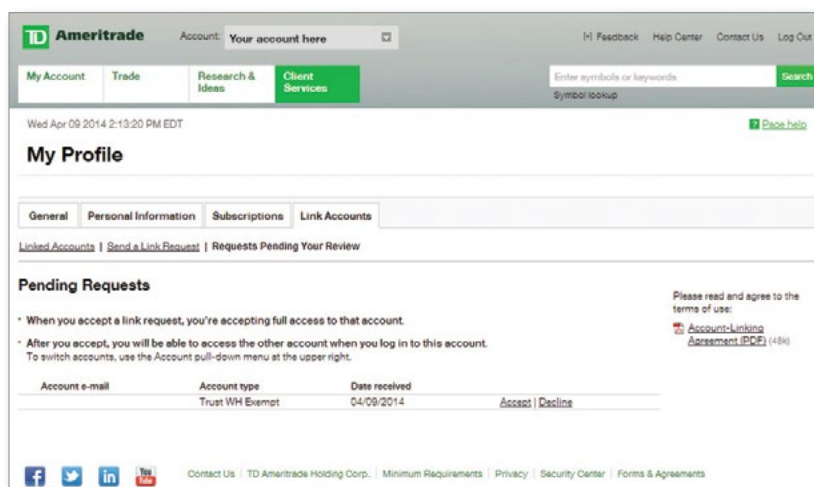
- 6 | Once you receive confirmation of your request, **log-out** of the secondary account from the **“Log-Out Link”** in the upper right corner of your screen
- 7 | Repeat steps 1-6 to link additional secondary accounts, up to a total of 10 accounts
- 8 | Once all linking requests have been entered, **log-in** to your primary account
- 9 | Go to the **“Linked Accounts”** page and click **“Requests Pending Your Review”**, then click **“Accept”** for each of your account requests

A powerful account management tool

Single Sign-On and Account Linking from TD Ameritrade lets you securely access and manage your brokerage accounts anytime, anywhere. Our streamlined approach combines convenience and flexibility, giving you more control of your retirement investments.



Log-out screen (fig 6)
For illustrative purposes only.



Request Pending screen (fig 9)
For illustrative purposes only.

If you have questions about Single Sign-On or Account Linking, call TD Ameritrade at 866-766-4015.

Representatives are available 8am-7pm, ET, Monday through Friday, (excluding New York Stock Exchange holidays).



*TD Ameritrade was ranked #1 out of 17 online brokers evaluated in the StockBrokers.com Online Broker Review 2014. TD Ameritrade was rated #1 overall. TD Ameritrade was also rated #1 or Best in Class (within top 5) in several categories including: "Platforms & Tools", "Customer Service", "Education", "New Investors", "Research", "Mobile Trading", "Options Trading" and "Active Trading". The thinkorswim platform was recognized as the Best Desktop Platform.

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