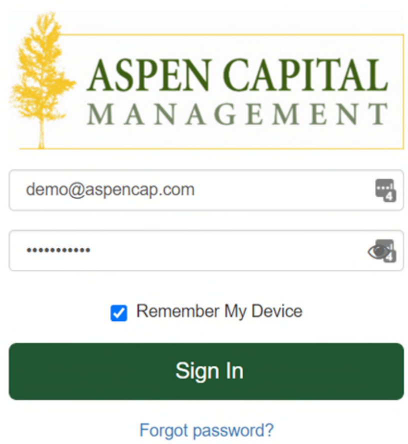
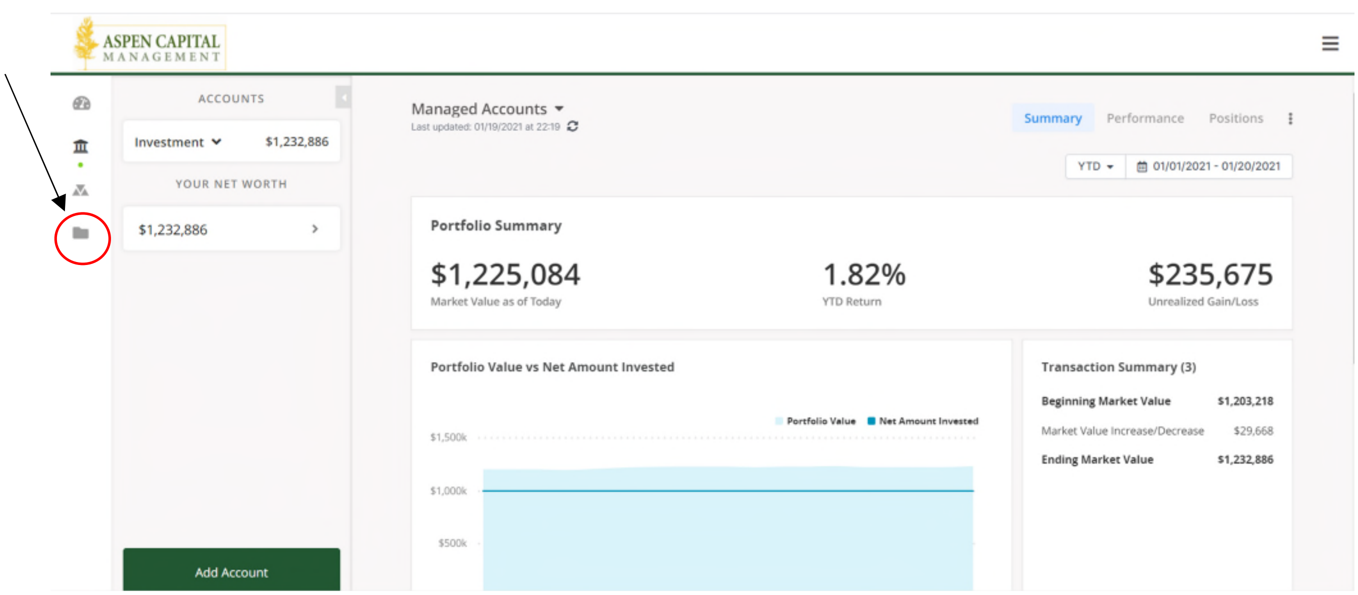
How to Access Quarterly Statements and Year-End Tax Reports in the Client Portal

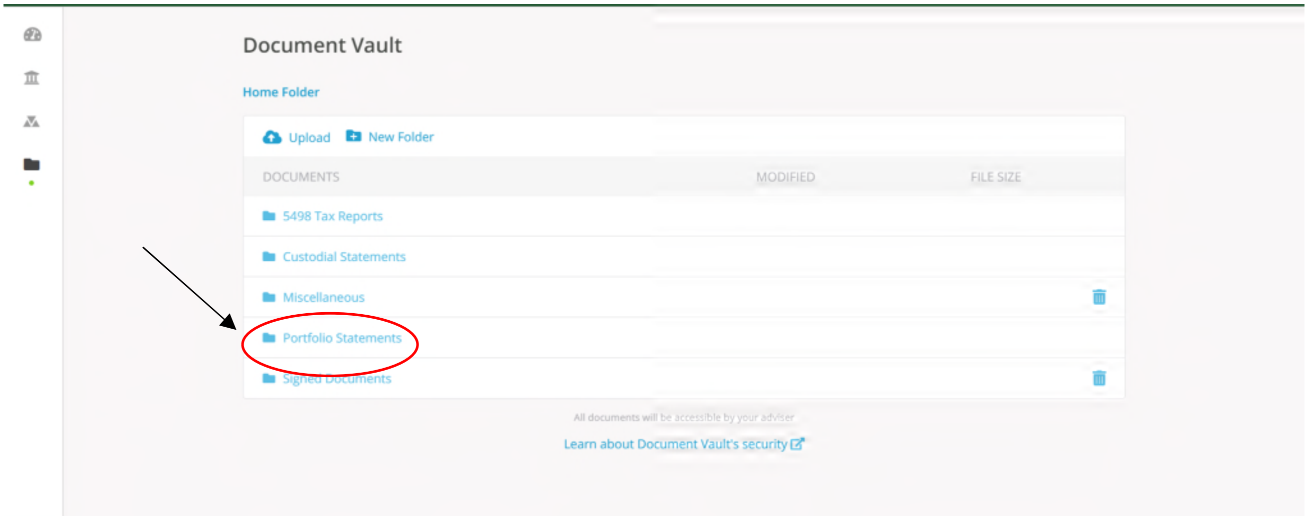
1. Log into the client portal with your username and password



2. From the portal homepage, click on the folder icon on the left side of the screen to access your document vault:



3. Within the document vault, your quarterly reports and year-end tax reports are located in the "Portfolio Statements" folder



4. Please note that you also have access to TD Ameritrade month-end statements for each of your TD Ameritrade accounts in the "Custodial Statements" folder, and access to TD Ameritrade tax forms in the "Tax Reports" folders for each specific type of report (in the image above, "5498 Tax Reports").