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<Month XX, 20XX>

JOHN SAMPLE  
TD AMERITRADE CLEARING, CUSTODIAN  
123 MAIN ST  
OMAHA, NE 68103-2577

Dear Valued Client,

**Your account number is:** <123456789>

We are excited to support the relationship between you and < Advisory Firm>.and that you have selected TD Ameritrade Institutional to safeguard your assets.

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Please note that on your first visit, you will be prompted to create a unique user id and password. Also please ensure that you have provided us your e-mail. This will allow us to contact you in an efficient and secure way with important information about your account.

#### **Please Confirm Your Account Information**

To ensure we have capture your account information correctly, please review the following for accuracy:

JOHN SAMPLE TD AMERITRADE CLEARING, CUSTODIAN  
123 MAIN ST  
OMAHA, NE 68103-2577  
JOHN.SAMPLE@TDAMERITRADE.COM

If any of this information is incorrect, or if you need an additional copy of the TD Ameritrade Institutional Client Agreement, our Privacy Policy, our Business Continuity Plan, or our Standard Commission and Fee Schedule, please contact your Advisor, < Advisory Firm> or log in to [www.advisorclient.com](http://www.advisorclient.com) (see above).

We look forward to continuing to support the relationship between you and your Advisor, and are committed to providing the best service experience in the industry. Thank you for trusting us with your business.

Sincerely,

John V. Tovar  
Managing Director  
TD Ameritrade Institutional

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