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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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You may access your account on line by going to www.advisorclient.com. Here you will be able to obtain account information, trade confirmations, account statements, tax documents and much more (your advisor may have their own client portal to access your account information).

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 (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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