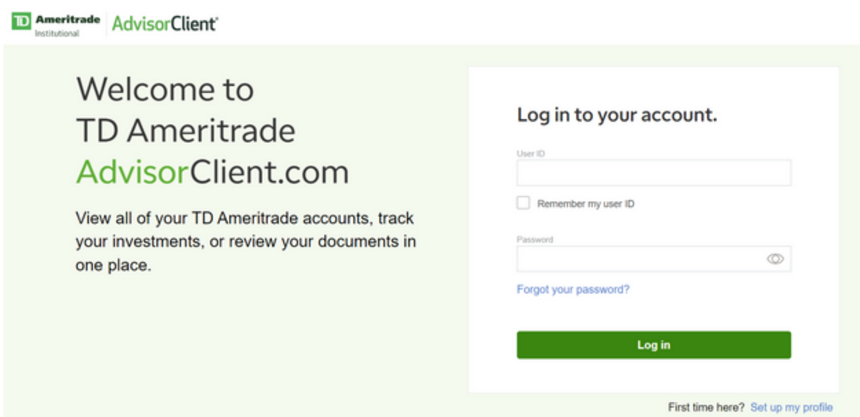
ASTORIA STRATEGIC WEALTH

Important changes regarding electronic delivery from TD Ameritrade

On or around May 17th, you will be receiving an email from TD Ameritrade Institutional **regarding instruction on how to maintain e-delivery of statements, trade confirmations and other communications from TD**. The nutshell version is, as of July 22, 2022, you must have or create a direct login to *TD Ameritrade Institutional.* Failure to do so will result in your communication delivery being **changed to paper** until and unless you complete this activation. Please also know that the TD Client Platform (called AdvisorClient®) User IDs are **specific to tax identification numbers.**

As this platform is **intentionally** designed to be an independent record keeper for your accounts, we are unable to provide any direct assistance with these logins. We do not have access or authority to establish, confirm or change your login information. While we regret not being able to be particularly helpful, this is an **appropriate and healthy security mechanism for you.**

If you do not know your login information, or even know if you have established login credentials, we recommend you first visit *www.advisorclient.com*.



If you are not able to recover or establish your login credentials, please call TD Technology services to assist. They can be reached directly at 1.800.431.3500, Option #3. You will be asked the following questions to authenticate your identity **before continuing with the call.**

- Name
- Social Security Number or Tax Identification Number
- Phone number on record
- Date of Birth
- Name of Adivsory Firm - That's us!
- An Existing Account Number
- An Approximate Account Value or Security Held within the Account

While we are quite confident that you will have no problem with the first four questions, we most certainly can help with the last two. Recall also that this information is all available (and more) in your *Astoria Strategic Wealth Portal.*