



ALDRICH WEALTH CLIENT PORTAL

How to Access Your Investment Account

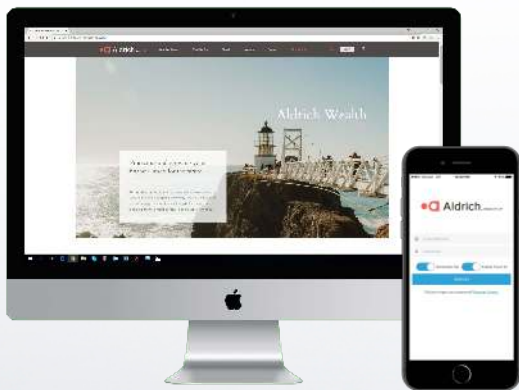
Online access is available to all Aldrich Wealth clients on smart phones, tablets or PCs so you can view your investment account and transactions conveniently. Initial setup is easy, please see details below.

Client Portal Setup

- Check your personal email inbox for activation email.
- Set up your client portal password and security questions following the link provided within the activation email.
- Activation link expires in 72 hrs - if you don't get your access set up in time, just email your advisor for a new link.

PC/Mac Access

- Visit the Aldrich Wealth website at wealthadvisors.com.
- Click the login tab in the upper right hand corner of the home page of the Aldrich Wealth website.
- Login, using your email address and the password you created at setup.



Mobile/Tablet Access

- Visit the Google Play or iTunes App Store.
- Search "Aldrich Wealth" in the App Store search bar.
- Download the Aldrich Wealth app. The app is completely free to download.
- Open the app on your smart phone.
- Login to the app using your login credentials.



*For direct access to the TD Ameritrade website, please visit www.advisorclient.com and click on the "Get Started" button or call 800-431-3500.

wealthadvisors.com



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