

TD Ameritrade Institutional – online access



The following is the step-by-step process to set-up your online access to TD Ameritrade Institutional (TDAI):

- 1) Visit: www.ns-ag.com/account-logins/ (book mark this page for future reference, you will be using other links from this page)
- 2) Click on the box for “TD Ameritrade”
- 3) Click on “First time here? Get Started” (**DO NOT** enter your username and password)
- 4) Click on “Already have a UserID?”
- 5) Enter your UserID: (provided by North Star)
- 6) Enter your zip code
- 7) Click on “Continue”
- 8) Select one of the options to get your security code:
 - a. TD Ameritrade will call your phone number listed.
 - i. Click on “Get code”
 - ii. Enter the code shown in the phone after you receive the call
 - b. TD Ameritrade will send the code to the email listed.
 - i. Click on “Get code”
 - ii. Enter the code sent to your email
 - iii. Click on “Continue”
- 9) Verify/correct your email address
- 10) Enter your password & confirm your password
- 11) Select your 4 security questions and provide your answers.
- 12) Click on “Continue”
- 13) Review then click on “Continue” (you can print for your future reference if you would like)
- 14) Review accounts associated with your UserID then Click on “Continue”
- 15) Select your preference for statement and confirmation delivery
 - a. You have three choices for customizing your delivery:
 - i. Leave them all for paper delivery (default)
 - ii. Click on the green button to “Set all to electronic notification” or
 - iii. Click on “Edit individual” to make selections for each Statements or confirmations for each account, then hit save at the bottom.
 - b. Select “I understand...”
 - c. Click on “Continue”
- 16) Select your status (I am a nonprofessional – default)
- 17) Select “I agree...”
- 18) Click on “Continue”
- 19) An overview video will pop-up on the first time you visit the site. I would recommend watching the video as it is very useful. The video will quickly familiarize you with their site.

For married couples...

If you are married, you will want to ensure your spouse follows the above steps to create their own online access. You only have “view only” access to their account(s). So, you will NOT have access to change their email address, mailing address, move money and change delivery preference for statements and/or confirmations.

If you need to have your password reset to the last 6 digits of your social security number call TDAI at (800) 431-3500 x3 x3 (M-F 9am-8pm EST).

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