

AdvisorClient[®] for the Amazon Alexa

Welcome to AdvisorClient from TD Ameritrade

The AdvisorClient skill for Alexa enables you to get market information as well as your account details all through voice commands. PIN-based authentication helps ensure your information is secure.

Features:

- Daily Briefing*
- Real-time Quotes
- Events & News
- Account Summary
- Account Positions
- Account Balances
- Secure Access

Getting started

- 1** To get started, please download the Alexa app on your smartphone
- 2** Sign in with your Amazon account. If you would like to use an Echo device, log in with the same email address that is linked to your smart speaker.
- 3** Go to the Menu on the Alexa app and click “Skills & Games”
- 4** Search for “AdvisorClient from TD Ameritrade”
- 5** Click “Enable to Use”

Link account & set up PIN

- 1** From the AdvisorClient from TD Ameritrade skill on the Alexa app, click “Settings”
- 2** Click “Link Account” and Accept Terms & Conditions
- 3** Log in using your AdvisorClient ID and password
- 4** Set your voice PIN by entering a four-digit code. Alexa will prompt you to say this code when accessing your account.
- 5** Tell Alexa, “Alexa, open AdvisorClient” and select your desired action

You can also begin by saying “Alexa, what’s my account balance from AdvisorClient?”

Daily Briefings, quotes, and events

“Alexa, ask AdvisorClient to/for ...”

Upcoming events for
[any company]

Give me a quote
for [any company or
ticker symbol]

Get the Daily Briefing


Account balances, positions, and summary

“Alexa, ask AdvisorClient to ...”

Get my positions

Give me
my account summary

AdvisorClient[®]

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