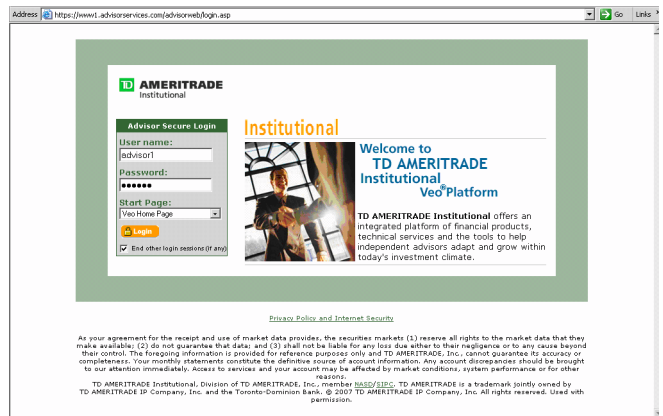


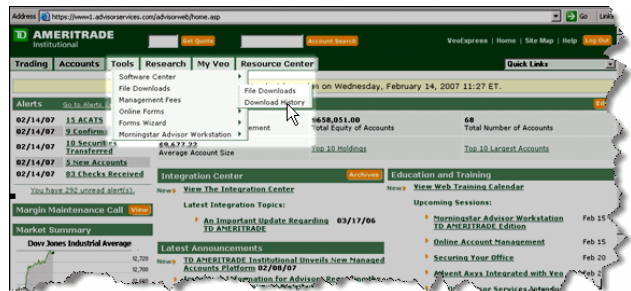
Tamarac PortfolioCenter®

Downloading TD AMERITRADE (Legacy Waterhouse) Files Using the VEO Web Download

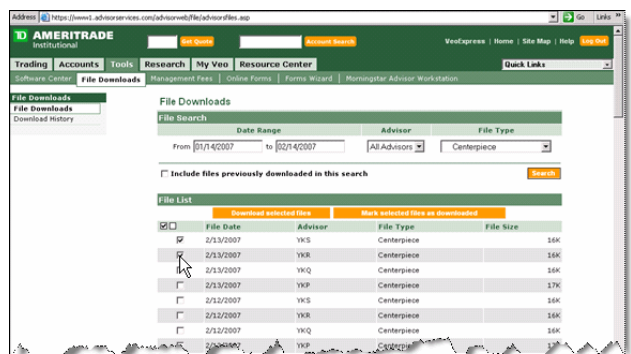
- 1 Open a web browser and go to www.advisorservices.com.
- 2 Enter your user name and password, and then click the **Login** button.



- 3 In the main view, go to:
Tools | File Downloads | File Downloads



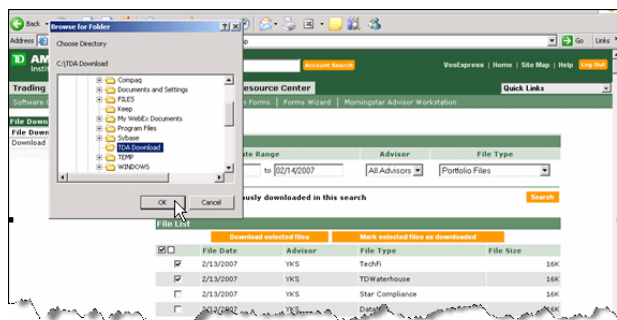
- 4 In the File Downloads view, check the box to the left of each file you want to download.
- 5 Click the **Download Selected Files** button to start the download process.



- 6 Select the location of the files you want to download.

In most cases, the path is TDA Download or something similar.

Click **OK** to start the download.



- 7 A status bar appears as the download progress and until it is complete.

Once the status indicates the download is complete, open PortfolioCenter and click on the Interfaces tab to extract the files. You should see a “new” file status for each date you downloaded.

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