

DOWNLOADING TD AMERITRADE FILES USING THE VEO WEB DOWNLOAD FOR PORTFOLIOCENTER HOSTED™

This document details the process of downloading files from TD Ameritrade's VEO Web download in the PortfolioCenter Hosted environment. If you are experiencing issues not described by this document, please contact your TD Ameritrade representative.

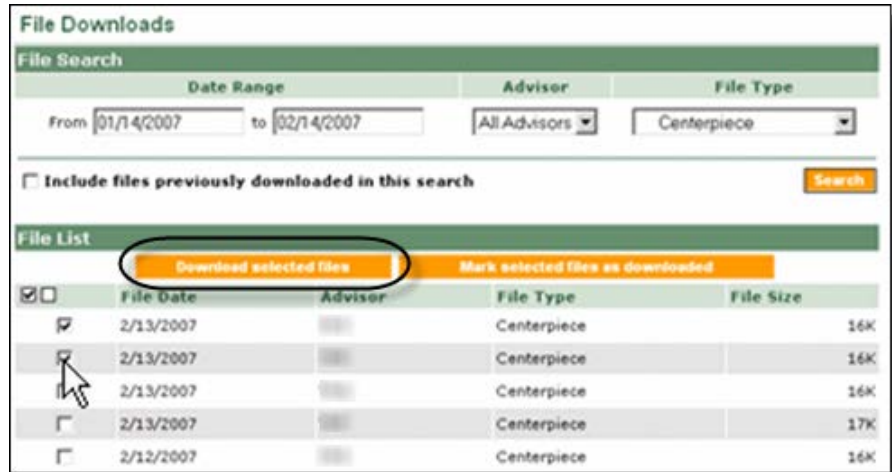
- 1 Log in to your PortfolioCenter Hosted Virtual Desktop.
- 2 Open a web browser and go to www.advisorservices.com.
- 3 Enter your user name and password, and then click the **Login** button.



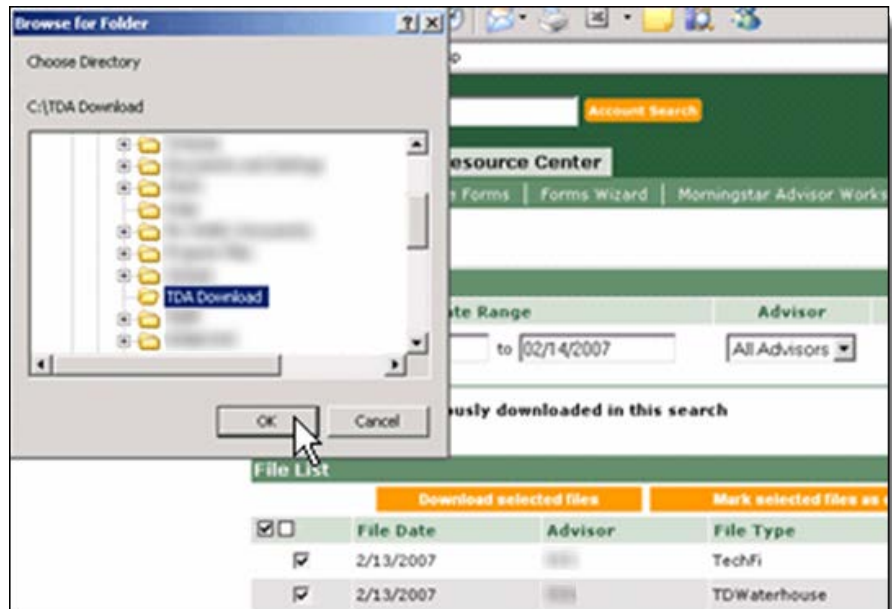
- 4 In the main view, go to:
**Tools | File Downloads |
File Downloads**



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



- 7 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.



- 8 A status bar appears displaying the download progress 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.

For institutional audiences only.

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