

TD Active Trader Migration Checklist

Welcome to TD Active Trader!

The following checklist provides you with step-by-step guidance on what you need to do before and after your trading account is migrated to TD Active Trader.

Before Migration

1. Get new log-in credentials

As a TD Direct Investing client, you may already have an active Connect ID for thinkorswim. If so, you may use your existing Connect ID to log in to TD Active Trader. If you do not yet have a Connect ID or if you don't remember your Connect ID, contact us at 1-877-348-6722 Monday-Friday, between 7 a.m. and 10 p.m. ET and we can assist.

Note

- You cannot use your thinkorswim credentials to log in to TD Active Trader.
- If you already have an active Connect ID for thinkorswim, when you log in to WebBroker you will see your thinkorswim account number listed in WebBroker. In this case, you can use your WebBroker Connect ID to log in to TD Active Trader.
- If you do not see your thinkorswim account when you log in using your Connect ID, please call us at 1-877-348-6722.

2. Try the TD Active Trader Practice Account version and create your custom layout

You can try out a fully equipped, practice version of TD Active Trader for up to six months. Simply create your own credentials and log on to the practice version which provides you with \$100,000 in practice money.

All customized layouts in the TD Active Trader Practice Account version can be saved and exported from the practice version to the live version by saving the layout locally on your device. After signing into the live version of TD Active Trader, you can upload the layout to the live version.

To access the TD Active Trader Practice Account:

1. Click on this [link](#).
2. Click **Register now**.
3. Follow the on-screen directions to obtain your TD Active Trader practice account credentials.
4. Start practicing your trading methods.

Note

- You cannot use the same login credentials for the practice and the live version. The practice account has its own credentials, and the live account uses a Connect ID.
- Some customizations will not migrate to TD Active Trader. We suggest recreating any important customizations in your Practice Account so it can be imported to the live version before you are no longer able to access thinkorswim.
- Your Practice Account will be purged six months after your first log in and you will no longer have access to any data saved within.
- TD will only use any personal information you share with us required to set up your access.

After Migration

3. Access TD Active Trader and complete your first-time log-in

As a TD Direct Investing client, you may already have a Connect ID for WebBroker. To log in to TD Active Trader for the first-time, use your Connect ID and password. If you have received a new Connect ID, use the temporary password that we provided. If you don't know your temporary password, contact us at 1-877-348-6722 Monday-Friday, between 7 a.m. and 10 p.m. ET.

Follow these URLs and instructions to directly access or download and install TD Active Trader to your preferred platform.

Desktop	Windows 10 or later Mac OS X 10.11 or later	Windows installer: https://tdactivetrader.td.com/PROD/installer/InstFiles/tdactivetrader_x64_installer.exe Coming Soon: Mac installer	Use the provided URL to download the installer for your Windows or Mac machine. Once download is complete, you can run the installer. After installation is complete, use the TD Active Trader icon on your desktop to launch the software.
Web	TD Active Trader can be used from the last three major versions of any compatible browser.	URL to web app: https://tdactivetrader.td.com	Use the provided URL to open TD Active Trader in your preferred browser from any device. Note: TD Active Trader cannot be used with Internet Explorer.
Mobile	Coming Soon		We are committed to adding new features and enhancements to empower your investment decisions. Look out for the mobile version of TD Active Trader coming soon.

Recommended minimum system requirements for:	Light User	Moderate User	Power User
Sample User Profiles	<p>I place trades in TD Active Trader and use it to get a real-time view on my holdings and open orders.</p> <p>I do technical analysis with simple charting to get trading ideas.</p> <p>I only use one screen and organize my widgets in different workspaces.</p> <p>I don't typically view too many streaming widgets in one workspace; nor do I have too many streaming entries in any one widget.</p>	<p>I use link mode to broadcast to other widgets.</p> <p>I use up to 2 screens total with popped out widgets.</p> <p>I have a few charts open for analysis and comparisons.</p> <p>I typically have a few streaming widgets in the same workspace and have a fair number of streaming entries within these widgets.</p>	<p>I use a multi-screen setup (more than 2 screens total with popped out widgets).</p> <p>I strategize with advanced technical analysis and sophisticated charting.</p> <p>I create complex workspaces with multiple charts alongside streaming entries and widgets.</p>
Connection Bandwidth	50 Mb/s	100 Mb/s	300 Mb/s
Processor	2.4 Ghz i5 or AMD equivalent	3 GHz i5 or AMD equivalent	3.5 GHz i7 or AMD equivalent
RAM	8 GB	16 GB	32 GB
Video Resolution	1920 x 1080	1920 x 1080	3840 x 2160 or multi-screen
Browser & Operating System	Most up-to-date version		
Compatible Browsers	Google Chrome, Microsoft Edge, Mozilla Firefox, Safari		
Browser Settings	Allow cookies for session (medium security level)		

4. Accept and sign Exchange Agreements

When you sign-in to the TD Active Trader live version for the first time, your credentials are automatically checked to confirm whether you have a signed Exchange Agreements currently on file. If an agreement is not associated with your profile, you will be prompted to read and sign the Exchange Agreements. This step is mandatory, and you will not be able to use TD Active Trader until you have accepted your Exchange Agreements.

Helpful Tips for completing your Exchange Agreements

- Ensure that pop-ups are enabled, or you will not be able to view your agreements.
- You will need to click and scroll through each Exchange Agreement link individually to “agree to all” and submit.
- If you are unable to submit once your Exchange Agreements are completed, this means you have incomplete personal information. You will need to fill out all pertinent client information fields that appear on screen before you can proceed to TD Active Trader.

5. Import your saved layout into the TD Active Trader live version

You can import any layouts which you have saved in the practice account once logged in to the TD Active Trader live version.

1. Log in to the live version of TD Active Trader.
2. Click on the Layout icon located in the top, right corner. Select **import layout** from file.
3. Select your saved layout file and select **upload**.

Note

- Charts will need to be recreated as we are unable to migrate from thinkorswim.
- All Watchlists containing less than 4000 ticker symbols will automatically be migrated to TD Active Trader.

6. Recreate open orders that were originally placed in thinkorswim

Open orders in thinkorswim will not be migrated to TD Active Trader.

1. Log in to TD Active Trader.
2. Open **Account > Orders**.
3. If an order is missing, recreate the order in the Order Entry tool.

For more resources to help you through your migration visit our [**TD Active Trader Migration Resource Centre**](#) or our [**TD Active Trader Help Centre**](#) for more in-depth questions and answers.

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