TD Ameritrade Institutional and Charles Schwab Transition Timeline

June 2023

Albitz/Miloe & Associates, Inc. REGISTERED INVESTMENT ADVISER

Albitz/Miloe & Associates, Inc.

REGISTERED INVESTMENT ADVISER









November 25, 2019

Charles Schwab announces plan to acquire TD Ameritrade. Acquisition is formally completed October 6, 2020.

June 28, 2023

You will receive a notification via mail or email, depending upon your account delivery preferences, noting the pending transition of your TD Ameritrade Institutional account to Charles Schwab.

August 8, 2023

If you use AdvisorClient.com to access your account, a notification will inform you that you will be able to create your credentials to the Schwab Alliance website which will be the new hub to access your account information online.

September 5, 2023

Over Labor Day Weekend, TD
Ameritrade Institutional will
officially transfer your
accounts to Charles Schwab as
custodian. Albitz/Miloe &
Associates, Inc. remains your
investment adviser.