



Waterhouse

**Here's your guide to getting started
with
WebBroker Select**

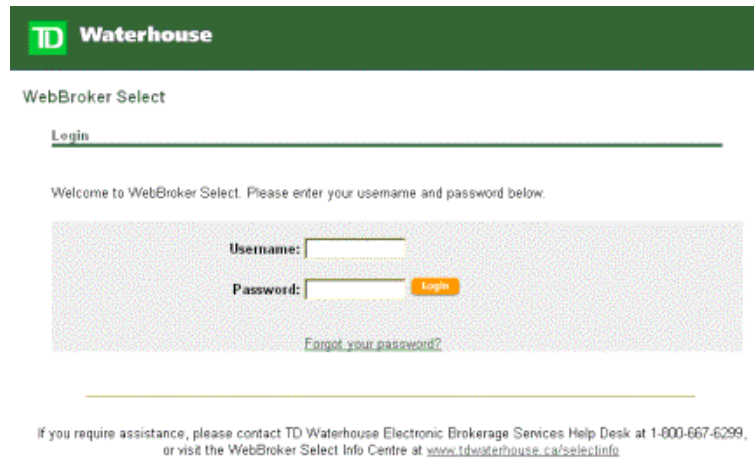
**Questions?
Contact TD Waterhouse
at 1-800-667-6299 (Canada Only)
or (416) 982-6000**

WebBroker Select* Getting started guide

Creating a Portfolio

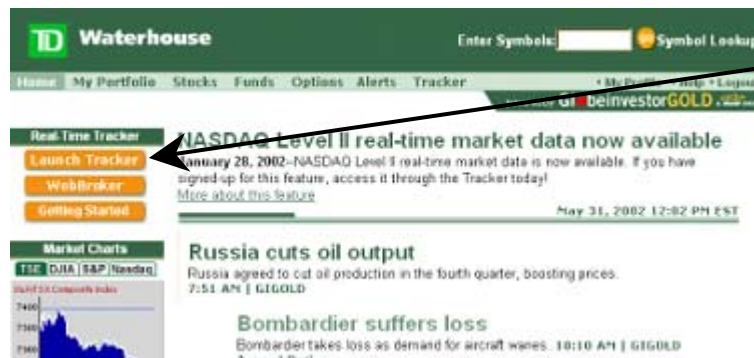
By following the steps outlined below, you will be able to create and edit your WebBroker Select portfolios. Keep in mind that you can create up to 10 portfolios with up to 100 stocks in each!

On Step #1 you will be on the Login screen



Step #1: Log in to the WebBroker Select site using your user name and password.

On Step #2 you will be on the WebBroker Select home page



Step #2: Select the "Launch Tracker" button in the top left hand corner of the home page or click on the "Tracker" link in the top navigation bar. **Note:** You must have Java Virtual Machine loaded on your PC to use the Tracker. You can download this program at www.microsoft.com or www.netscape.com

On Step #3 you will be on the Tracker page



Step #3: Once the Tracker is open, go to the "Portfolios" area in the top left corner of the page. If you are not there already, click on the "Portfolios" tab. Clicking here ensures you are in the proper area to create your portfolio.

On Step #4 you will be on the Tracker page



Step #4: Click on the "Create" link to the left of the Portfolio box. A popup window will appear.

On Step #5 you will be in the Create Portfolio window.

Create Your Portfolio [Help for this page](#)

Enter Portfolio Name

Step #5: In the new window, you will be asked to enter a name for your portfolio. Please avoid using symbols, e.g. #, %, as many will not be accepted in the portfolio name field. After typing in the name, click on the "Create" button.

On Step #6 you will be in the Update Portfolio window.

Update Your Portfolio [TEST](#) [Help for this page](#)

Select Portfolio [Create new portfolio](#)

Add Stock(s) to Your Portfolio
 To Select a Stock from a specific exchange, use the exchange codes listed below (e.g. BCE-T, BCE-N)
 Enter Stock Symbol(s): [Symbol Lookup](#)
 (to add multiple stocks, enter multiple symbols separated by a space)

T-Toronto	QS Nasdaq SC	Q2-OTCBB	X-Canadian Venture
N-New York	A-American	Q-Nasdaq NM	

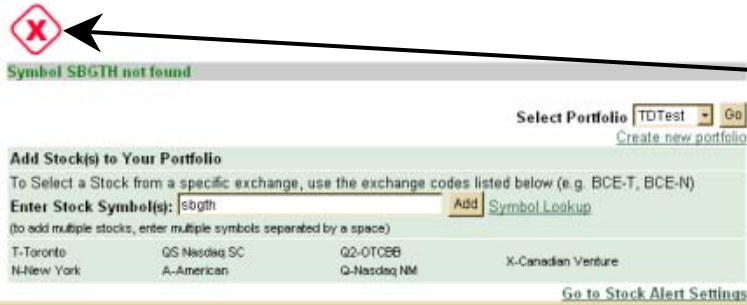
[Go to Stock Alert Settings](#)

Select	Symbol(s)	Company name
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Step#6: You will be presented with the "Update Your Portfolio" window. Here you can enter the stocks you wish to monitor.

To enter a stock, type in the symbol and the exchange, following this format: For BCE trading on the Toronto Stock Exchange, you would enter, **BCE-T**. Exchange abbreviations are displayed for you on this page. After entering the symbol, click on the "Add" button. You should see the symbol added on the screen within a few seconds.

TIP! You can add more than one symbol at a time into your portfolio, up to 50 characters in the box. Symbols must be entered in this format, symbol-exchange (space) symbol-exchange (space) Example: BCE-T (space) TD-T (space)



If you receive an error message when entering a symbol or exchange, please use the **Stock Symbol Look up** to amend the symbol.

TIP! Check that the correct exchange is selected for your symbol.

Stock Symbol Look Up

To search for a symbol from the "Update Your Portfolio" window, select the "Symbol Lookup" link.

Enter a Company Name:

Begins with Contains

Exchange:

Another new window will appear. Enter the company name you wish to search. If you know the Exchange, you can choose it from the drop down box, if not, select the "All" option. Then, click on the "Look up" button.

1 Company found.

Company Name	Symbol(s)
Microsoft	MSFT-Q

The symbol and exchange will appear, e.g. MSFT-Q

To add the symbol to your portfolio, simply click on the symbol name and select, "Close Window".

Enter a Company Name:

Begins with Contains

Exchange:

[Help for this page](#)

Select Portfolio [Create new portfolio](#)

Add Stock(s) to Your Portfolio
 To Select a Stock from a specific exchange, use the exchange codes listed below (e.g. BCE-T, BCE-N)

Enter Stock Symbol(s): [Symbol Lookup](#)
 (to add multiple stocks, enter multiple symbols separated by a space)

T-Toronto QS Nasdaq SC Q2-OTCBB X-Canadian Venture
 N-New York A-American Q-Nasdaq NM

[Go to Stock Alert Settings](#)

Your Portfolio Contains

Select	Symbol(s)	Company name
<input type="checkbox"/>	ATY-T	ATI Technologies
<input type="checkbox"/>	BCE-T	BCE Inc.

You will be returned to the "Update Your Portfolio" window and the symbol will be displayed.

To add this symbol to your portfolio, click on "Add".

Create a new portfolio

To create a new portfolio from this page, select "Create new portfolio"

On Step #7 you will be on the Update Your Portfolio page

[Help for this page](#)

Select Portfolio [Create new portfolio](#)

Add Stock(s) to Your Portfolio
 To Select a Stock from a specific exchange, use the exchange codes listed below (e.g. BCE-T, BCE-N)

Enter Stock Symbol(s): [Symbol Lookup](#)
 (to add multiple stocks, enter multiple symbols separated by a space)

T-Toronto QS Nasdaq SC Q2-OTCBB X-Canadian Venture
 N-New York A-American Q-Nasdaq NM

[Go to Stock Alert Settings](#)

Your Portfolio Contains

Select	Symbol(s)	Company name
<input type="checkbox"/>	ATY-T	ATI Technologies
<input type="checkbox"/>	BCE-T	BCE Inc.
<input type="checkbox"/>	NLT	Noriel Networks Corp.
<input type="checkbox"/>	RTRSY-Q (USE)	Reuters Group

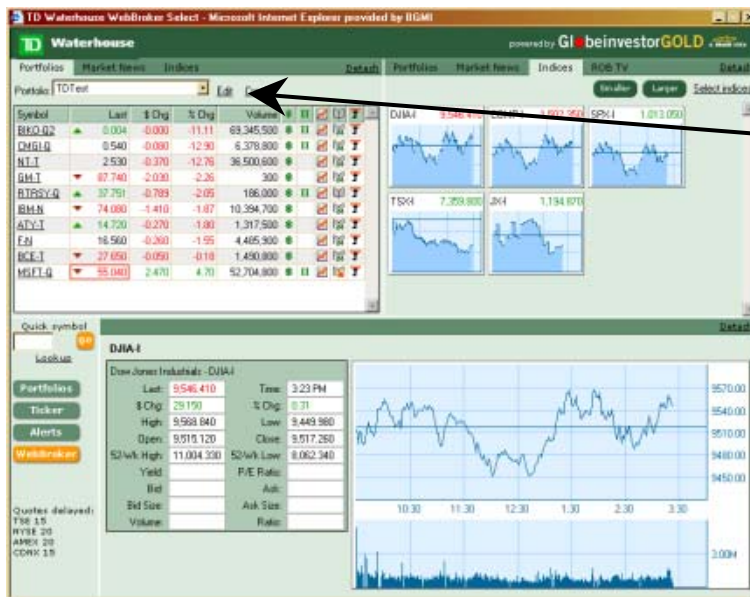
Selected stocks from Your Portfolio

You can choose to remove a stock from your portfolio. First, ensure the correct portfolio is selected.

Next, check the box for the symbol(s) you wish to remove and then click the "Remove" button.

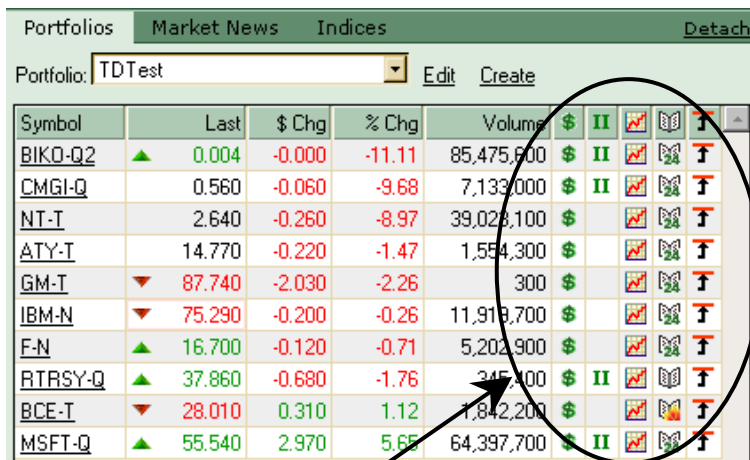
Once you have completed creating your portfolio, close the window and you will be returned to the **Tracker** page or if you wish to create another portfolio, simply click on "Create new portfolio."

Additional Tips!



Keep in mind that you can always change or update your portfolio at any time by selecting the "Edit" link from the **Tracker** page.

See what you can do with your portfolio!



Now that you've created your portfolio(s), you can choose to view information about your entire portfolio or your individual stocks, including pricing information, charts and news!

Simply click on the icons to display the following information within the Tracker:

- The \$ icon will present pricing information, i.e. high, low, bid, ask, close
- The chart icon will display charts
- The open newspaper icon will display news articles on the respective company
- The up arrow icon will move the stock to the top of your portfolio list

Watch ROBTv in the Tracker!



To keep up-to-date on market news, you can also view ROBTv inside while in the **Tracker**.

Simply select the ROBTv tab in the top right hand corner.

For additional help, watch for the "Help for this page" link displayed on WebBroker Select pages.

For any questions, please contact the TD Waterhouse Electronic Brokerage Services Help Desk at 1-800-667-6299.

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