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Interactive Brokers Account Management Portal

Access Link

Interactive Brokers Account Management Link

Security

You will need the following security items for your IB account:

1. Username
    a. Please contact Kyle@AlphaArchitect.com if you do not know your username.
2. Password
    a. Password Reset Instructions
3. Security Device
    a. Secure Login System Information
    b. How to Request a Replacement Security Device
4. Security Questions
    a. How to Change Security Questions

If you are missing all of the above security items, please contact Interactive Brokers Client Services Desk: 1 (877) 442-2757

If you have questions or need assistance, please contact Kyle@AlphaArchitect.com.

Best Practices

Please review the following link for Customer Best Practice suggestions from Interactive Brokers.

IB Best Practices

How To

Use the Feature Explorer to quickly find brief descriptions and useful links for over 500 of IB's most interesting features including reporting and funding.

IB Feature Explorer

Household

Description

Individuals with multiple accounts can group them into a household to more efficiently manage those accounts. The primary user of the household, called the Head of Household, is allowed to view reporting and account information of the other accounts in the household. Householding will reduce the amount of paper mail received and will allow clients to view consolidated reporting and account details in Account Management.

Requirements

- Same Last Name
- Same Home Address
  - Account holders in the same family but with different last name who are living at the same home address and who are in a dependent relationship can be grouped in a household
- Account types that can Household
  - Individual Accounts
  - Joint Accounts
  - Trust Accounts
    - Trust accounts can be grouped in a household if the current trust beneficiary's is the family
  - UGMA/UTMA Accounts
  - Traditional, Roth, Rollover, Inherited, SEP IRA Accounts
- Account types that cannot Household
    - Organization Accounts
      - Organization accounts can be grouped in a household if the underlying organization is solely owned by or established for the benefit of the family members
  - Business /Corporate accounts
- Choose only one head of household

Process

- Notify Kyle@AlphaArchitect.com if you would like to household your accounts.
- You will be provided with a HelloSign form via email that each household member must sign and date.
- Kyle will email completed form to householding@interactivebrokers.com
- Interactive Brokers will undergo a compliance review before householding the accounts. This process may take one to two weeks.
- Kyle will send a confirmation email once complete.

Reports

Activity Statements

[Activity Statements Information from Interactive Brokers]

Instructions:

1. [Log-In to Account Management]
2. Reports > Activity > Statements
3. Choose report type and download

Delivery Methods

Report > Settings > Delivery > Activity Statements & Trade Reports

Portfolio Analyst

[Portfolio Analyst Information from Interactive Brokers]

Instructions:

1. [Log-In to Account Management]
2. Reports > Portfolio Analyst
    a. **Default Reports** are ready to download
    b. **Custom Reports** are available.

Delivery Methods

Report > Settings > Delivery > Portfolio Analyst

Tax Forms

Instructions:

1. [Log-In to Account Management]
2. Reports > Tax > Tax Forms
3. Choose report type and download