



## **TD AMERITRADE Institutional Veteran to Contribute Insight Regarding Advisor Best Practices on Financial Advisor Practice Management Website**

*George Tamer of TD AMERITRADE Institutional is the latest contributor in the independent advisory industry for Advisors4Advisors, a financial advisor practice management website.*

NEW YORK, March 8, 2010--[Advisors4Advisors](#) (A4A), a practice management website for independent financial advisors, today announced that George Tamer, who manages a national team of operations consultants at TD AMERITRADE Institutional, will contribute insight about advisor best practices. Tamer will write about sales, marketing, and operational tactics that independent advisors can implement to help increase efficiencies and build their businesses.

“2010 brings a wealth of opportunities for independent advisors to grow their businesses based on a number of factors, most notably increasing investor dissatisfaction with Wall Street and the onslaught of the baby boomer retirement wave,” said Tamer, director, strategic relationships for TD AMERITRADE Institutional. “We are very excited to team up with Advisors4Advisors to bring industry insight and analysis that can help advisors take their businesses to the next level.”

Tamer, who joined TD AMERITRADE in 1996, oversees a national network of consultants that work with independent Registered Investment Advisers (RIAs) on workflow, technology, and other key practice management issues. He and his team help advisors analyze software for customer relationship management (CRM), financial planning, portfolio management, performance reporting, and rebalancing. Tamer also consults advisors on niche marketing strategies, building a sales team, personnel management, and documenting processes to manage their businesses. Tamer, a graduate of College of the Holy Cross in Worcester, Mass., holds an M.B.A. in marketing from Baruch College's Zicklin School of Business.

“George and his team of consultants has spent the last decade visiting thousands of independent advisory firms to analyze their pain points and propose solutions to fix them,” said Andrew Gluck, A4A's founder. “He's not just someone writing about practice management for RIAs, he helps advisory firms implement practice management solutions. So we're thrilled to have George Tamer contributing on Advisors4Advisors about RIA practice management issues.”

### **About Advisors4Advisors, Inc.**

[Advisors4Advisors](#) is a practice management website for independent financial advisors and advisors interested in going independent. A4A was founded in 2009 by Andrew Gluck, CEO of Advisor Products, Inc. and columnist for *Financial Advisor* magazine. A4A provides an interactive advisor community featuring:

- **advisor reviews** of practice management tools and technology
- **aggregation** of advisor-targeted news daily
- **articles** by industry experts analyzing key aspects of the business
- **webinars** weekly about with CFP® CE credit



[Advisors4Advisors](#) is a comprehensive online resource for independent advisors that aggregates news advisors need to read. Thirteen advisory business experts contribute articles covering all key aspects of the business, A4A enables reviews by advisors of key software products they use in their practice and side-by-side feature comparisons of these products. A4A members get access to replays of over 60 hours of webinars about financial planning, investing, estate planning, practice management, technology, marketing, compliance, social networking, and other issues. Over 30 hours of CFP continuing education credits are available on webinar replays 24/7.

### **About TD AMERITRADE Institutional**

TD AMERITRADE Institutional is a leading provider of comprehensive brokerage and custody services to over 4,000 fee-based, independent Registered Investment Advisors and their clients.<sup>1</sup> Our advanced technology platform, coupled with personal support from our dedicated service teams, allows investment advisors to run their practices more efficiently and effectively while optimizing time with clients. [www.tdainstitutional.com](http://www.tdainstitutional.com)

<sup>1</sup> TD AMERITRADE Institutional, Division of TD AMERITRADE, Inc., member FINRA ([www.finra.org](http://www.finra.org)) / SIPC ([www.sipc.org](http://www.sipc.org)).

TD AMERITRADE and Advisors4Advisors are separate and unaffiliated and are not responsible for one another's services and policies. This material is designed for a financial professional audience, primarily registered investment advisors. Material is provided by TD AMERITRADE Institutional for informational purposes only and should not be construed as legal or professional advice. TD AMERITRADE Institutional disclaims any loss or liability that is incurred as a consequence, directly or indirectly, from the use or application of this publication.

---

### **Contact:**

Advisors4Advisors, Inc.  
Jim Voss  
[jvoss@advisors4advisors.com](mailto:jvoss@advisors4advisors.com)  
(888) 274-5755 ext. 249

TD AMERITRADE  
Kristin Petrick  
Communications & Public Affairs  
[kristin.petrick@tdameritrade.com](mailto:kristin.petrick@tdameritrade.com)  
402.574.6569

###