

# Unified Managed Account Exchange

## Meet Your Clients' Unique Needs with Flexible Investment Strategies

### The Next Generation of Managed Account Solutions

#### What is TD Ameritrade Institutional Unified Managed Account Exchange?

Unified Managed Account Exchange is an innovative, next generation solution that goes beyond traditional unified managed accounts.

With it, you can efficiently provide your high-net-worth and affluent clients with exactly what they want: Flexible, tailored investment solutions that meet their unique objectives and needs, including tax sensitivity and restrictions on investing in certain securities.

#### How can Unified Managed Account Exchange benefit your firm?

With Unified Managed Account Exchange, you'll be able to expand the types of investment solutions you offer to your clients.

You'll experience more flexibility in how you choose to manage portfolios, and, with simplified portfolio management, you'll have more time and energy to focus on other business management responsibilities.

The platform encompasses two distinct, single-account offerings designed to enable you to deliver a broad range of investment choices while streamlining account management:

Bundled approach	Open architecture approach
<ul style="list-style-type: none"><li>■ Benefit from the research and due diligence of Capital Market Consultants.</li><li>■ Access Separately Managed Account (SMA) strategies, mutual funds and Exchange Traded Funds (ETFs).</li></ul>	<ul style="list-style-type: none"><li>■ Construct your own portfolios, using your research.</li><li>■ Access a broad range of investment vehicles including SMAs, ETFs, Exchange Traded Notes (ETNs), mutual funds, closed-end funds and third party strategists.</li></ul>

#### OVERVIEW:

**Unified Managed Account Exchange offers an innovative approach to unified managed accounts.**

- Select from over 5,000 investment products from some of the industry's leading investment managers.
- Access professional research from firms such as Capital Market Consultants—or choose to do your own research.
- Tap into Overlay Portfolio Management provided by Placemark Investments to implement tax management strategies, recognize individual client risk requirements and more.
- Navigate the process from start to finish with the support of our Managed Account Solutions Consultants and service teams.

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## Experience the Benefits of Unified Managed Account Exchange

Utilizing Unified Managed Account Exchange enables you to enhance the investment management services you offer to clients and increase your firm's value proposition.

### Your clients receive:

- Access to institutional-caliber investment managers and portfolio management services
- Solutions that meet their investment objectives and unique needs

### You benefit from:

- Increased efficiency and streamlined operations
- Flexibility in being able to choose your investment management approach
- The ability to compete with larger financial institutions

With Unified Managed Account Exchange, you'll get more freedom of choice, enabling you to both support your high-net-worth and affluent clients' investment goals and elevate your business to a new level.

### Leverage these portfolio management resources:

#### Overlay Portfolio Management

As the Overlay Portfolio Manager (OPM), Placemark Investments helps with the operations and administrative activities of your client's investments. The OPM will coordinate all trading activity of the managers to customize client accounts, harvest tax gains or losses, and streamline portfolio rebalancing.

#### Investment consulting

Capital Market Consultants, an industry-leading investment consultant, has a collective 50 years of experience and can help you make informed investment product and manager decisions while providing access to institutional research and investment advice.

**Connect with an Experienced Consultant Today.**

**CALL** 800-934-6124

**VISIT** [tdainstitutional.com](http://tdainstitutional.com)



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