



## **MEDIA ADVISORY**

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## **TD AMERITRADE INSTITUTIONAL PROVIDES RIA'S THE CAPABILITY FOR CHARITABLE ASSET MANAGEMENT IN DONOR-ADVISED FUNDS**

### **Teams with the American Endowment Foundation to provide advisors a flexible and independent platform to manage their client's charitable giving**

**Jersey City, NJ, October 20, 2008** –TD AMERITRADE Institutional today announced that they will provide RIA's the ability for charitable asset management in donor advised funds through the American Endowment Foundation as part of the Affinity Services program.<sup>1</sup> The offering provides independent Registered Investment Advisors (RIAs) with comprehensive capabilities to assist clients with administrative convenience and potential cost savings associated with their charitable giving, and the ability to actively manage a customized portfolio in a donor advised fund.

A donor advised fund can provide a simple, flexible, efficient way to manage a client's charitable giving. A donor may enjoy immediate and maximum tax advantages, make grants on a flexible time table, build a charitable legacy, and increase philanthropic funds for future grantmaking. With charitable giving estimated to be approximately \$306 billion in 2007, this added functionality provides a significant opportunity to RIAs.

"Recognizing the importance of trusted relationships between advisors and their clients, TD AMERITRADE is pleased to offer an easy-to-use charitable giving vehicle tailored to preserving and enhancing advisor-client relationships through this partnership," said Brian Stimpfl, managing director, TD AMERITRADE Institutional. "We feel that AEF's unique independence is a tangible demonstration of our commitment to providing flexible solutions for the independent RIA."

Donor advised funds are currently available to TD AMERITRADE Institutional RIA clients with an initial contribution of only \$100,000 and offered at competitive price points. To learn more about TD AMERITRADE Institutional, please visit [www.tdainstitutional.com](http://www.tdainstitutional.com).

### **About TD AMERITRADE Institutional**

TD AMERITRADE Institutional is a leading provider of comprehensive brokerage and custody services to nearly 5,000 fee-based, independent Registered Investment Advisors and their clients.<sup>2</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.



### **About TD AMERITRADE Holding Corporation**

TD AMERITRADE Holding Corporation, through its brokerage subsidiaries,<sup>3</sup> provides a dynamic balance of investment products and services that make it the investment firm of choice for millions of retail investor and independent registered investment advisor clients. Listed by *Forbes* as one of America's best big companies, the Company offers a full spectrum of investment services, including a leading active trader program, intuitive long-term investment solutions and a national branch system, as well as relationships with one of the largest independent RIA networks.<sup>4</sup> The Company's common stock trades under the ticker symbol AMTD. For more information, please visit [www.amtd.com](http://www.amtd.com).

### **About American Endowment Foundation**

AEF was established as a national, public charity in 1993. Today, AEF is the nation's leading "[independent](http://www.aefonline.org)" sponsor of donor-advised funds. <http://www.aefonline.org>

<sup>1</sup> TD AMERITRADE and the American Endowment Foundataion are separate and unaffiliated companies, and are not responsible for each other's policies or services. Access to Affinity Services Program vendors is provided solely as a service to financial advisors using the brokerage, execution and custody services of TD AMERITRADE Institutional. These services are offered at a discount directly through the participating vendors. Participating vendors are independent and are not employees or agents of TD AMERITRADE. TD AMERITRADE does not guarantee nor are they responsible for the quality or accuracy of any vendor's product or service. In no instance should the listing of a vendor be construed as a recommendation or endorsement by TD AMERITRADE. Furthermore, TD AMERITRADE does not recommend or endorse any security described by any vendor.

<sup>2</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)).

<sup>3</sup>TD AMERITRADE, Inc., member FINRA ([www.finra.org](http://www.finra.org)) /SIPC ([www.SIPC.org](http://www.SIPC.org)), receives clearing and custodial services from TD AMERITRADE Clearing, Inc., member FINRA/SIPC. TD AMERITRADE and TD AMERITRADE Clearing, Inc. are subsidiaries of TD AMERITRADE Holding Corporation.

<sup>4</sup>More information on the Forbes award is available at [www.forbes.com/platinum](http://www.forbes.com/platinum).