



MEDIA ADVISORY

At the Company

For Media:

Jim Frawley

Communications and Public Affairs

(201) 369.8779

james.frawley@tdameritrade.com

TD AMERITRADE INSTITUTIONAL LAUNCHES ADVISORY PRACTICE “ROADMAP”

Web-based strategic planning tool helps turn business ideas and objectives into reality

Jersey City, NJ, October 27, 2008 – TD AMERITRADE Institutional today announced the exclusive launch of Roadmap™ – an innovative online planning tool developed by ActiFi, that helps financial advisors translate their high-level business objectives into definable and executable tasks.

Using Roadmap, an advisor works with a TD AMERITRADE Institutional Solutions Consultant to define business goals related to growth, expertise, profitability, time management, reducing risk, and/or enhancing client value. Roadmap then offers the advisor specific strategies, tactics, and hypothetical outcomes, ultimately producing a consulting report that can be saved, shared, and used as part of a firm’s ongoing strategic plan.

“In addition to core custody and execution, we are focused on helping advisors create value within their practices and achieve the vision they have for their business” said George Tamer, director, TD AMERITRADE Institutional. “Advisors want and need business consulting and guidance on how to run an efficient and profitable business. Roadmap provides advisors with best-practice solutions, yet each path is unique to a firm’s specific objectives and strategies.”

Roadmap takes the previously laborious work of creating a plan and simplifies it by guiding users down a defined path. Goals, strategies, and tactics are defined, timelines set, and tasks assigned to staff members. Advisors and their TD AMERITRADE Institutional consultants then use the Roadmap Accountability Dashboard to monitor progress, and continually adapt plans and create new strategies as tasks are accomplished.

“We’re excited with how TD AMERITRADE’s Consultants will leverage Roadmap to help advisors think about their businesses in new ways,” said Spenser Segal, CEO of ActiFi. “With Roadmap, advisors will be able to take the ideas they have for their business, get them into an actionable plan, and turn them into reality.”

More information on TD AMERITRADE Institutional is available at 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.¹ 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,² 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.³ The Company's common stock trades under the ticker symbol AMTD. For more information, please visit www.amtd.com.

About ActiFi

ActiFi™ works with financial practices and institutions to alter the economics of delivering world-class advice. By implementing proven people, process, and technology solutions, ActiFi's clients run more effective and profitable businesses with results that scale over time. In 2008, Inc. Magazine recognized ActiFi as the sixth fastest growing private company in the Twin Cities, and number 524 in the nation.⁴

¹TD AMERITRADE Institutional, Division of TD AMERITRADE, Inc., member FINRA (www.finra.org) / SIPC (www.SIPC.org).

²TD AMERITRADE, Inc., member FINRA/SIPC, receives clearing and custodial services from TD AMERITRADE Clearing, Inc., member FINRA/SIPC. TD AMERITRADE, Inc. and TD AMERITRADE Clearing, Inc. are subsidiaries of TD AMERITRADE Holding Corporation.

³More information on the Forbes award is available at www.forbes.com/platinum.

⁴More information on the Inc. 5000 recognition is available at www.inc5000.com.

TD AMERITRADE and ActiFi are separate, unaffiliated companies and are not responsible for one another's services and policies. Roadmap is a trademark of ActiFi, Inc. TD AMERITRADE is a trademark jointly owned by TD AMERITRADE IP Company, Inc. and The Toronto-Dominion Bank. © 2008 TD AMERITRADE IP Company, Inc. All rights reserved. Used with permission.