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Advisors Save Time, Simplify CRM Software Selection with New Assessment Tool from TD Ameritrade Institutional

Jersey City, N.J. - May 25, 2011 – TD Ameritrade Institutional, a division of TD Ameritrade, Inc., a subsidiary of TD Ameritrade Holding Corporation (NASDAQ: AMTD), offers advisors a new Customer Relationship Management (CRM) software assessment tool designed to cut the guesswork out of choosing a CRM vendor.

“Choosing the right CRM software is one of the more complicated and important technology purchasing decisions an advisor will make for their business,” said Mike Watson, director, practice management solutions, TD Ameritrade Institutional. “TD Ameritrade Institutional’s new research-based assessment tool does the work for the advisor, compiling a comprehensive and objective list of recommended CRM vendors based on the individual needs of their firm.”

The CRM software assessment tool is based on research findings in the [Advisor Technology Reports: CRM Edition](#), a study sponsored by TD Ameritrade Institutional and conducted by the Financial Planning Association and ActiFi,¹ a practice management software and solutions firm. Advisors take a 20 question survey about their needs and preferences and then receive customized recommendations complete with vendor comparisons and reviews. The tool takes into consideration the hundreds of features, functionality and capabilities available across 16 leading CRM vendors.

“Advisors can now take much of the guesswork out of identifying the right CRM for their firm and have a clear and actionable guide to making the right decision,” said Spenser Segal, CEO, ActiFi, Inc. “This is the beginning of a trend where TD Ameritrade Institutional consultants can continue to deepen the insights they can provide to help advisors make important technology decisions.”

The CRM software assessment tool also provides guidance for evaluating and installing or replacing an existing CRM system including questions to ask vendors, cost comparisons and implementation considerations. The tool is available to advisors on the TD Ameritrade Institutional platform through the Roadmap™ practice management program,² developed by Actifi. Advisors will work with one of TD Ameritrade Institutional’s strategic relationship managers or business consultants to complete the assessment.

“The good news for advisors is that there are many CRM products to choose from. However, that wide range of capabilities and technology platforms, such as on-premise or cloud-based, can make the selection process overwhelming and time consuming for an advisor,” said Watson. “Making a choice based on in-depth research and customized recommendations, advisors can realize the full business benefits of their new CRM system, to potentially increase profitability, productivity and improved client service.”

For more information about the CRM software assessment tool, please contact TD Ameritrade Institutional at 800-934-6124 or email institutionalsales@tdameritrade.com.



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.³ 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 ActiFi

ActiFi™ is a software and solutions company that creates scalable business execution programs for the financial services industry. By implementing its proven people, process, and technology solutions based on research, best-practices, and industry benchmarks, ActiFi clients run more effective and profitable businesses. Learn more at <http://www.actifi.com>

About TD Ameritrade Holding Corporation

For more than 36 years, TD Ameritrade Holding Corporation (NASDAQ: AMTD) has been in the business of serving individual investors – either directly or through a network of independent registered investment advisors. Through its brokerage⁴ and education⁵ subsidiaries, TD Ameritrade combines innovative trading technology, easy-to-use [trading tools](#), investment services and education, and superior client service to create a market-leading financial services experience. Home to *Kiplinger's* #1 online broker,⁶ *Barron's* #1 online broker for "Options Traders",⁷ TD Ameritrade provides millions of retail investors, traders and independent registered investment advisors with the tools, service and support they need to help build confidence in today's rapidly changing market environment. For more information and resources for journalists, please visit the TD Ameritrade [newsroom](#) at www.amtd.com.

¹TD Ameritrade participated as a custodian respondent in the study. TD Ameritrade is separate and not affiliated with Financial Planning Association or ActiFi and is not responsible for the policies or services of any third-party, except to the limited extent that TD Ameritrade participated in the study. TD Ameritrade does not guarantee nor is it responsible for the completeness or accuracy of the data provided or for the quality of any third-party product or service. TD Ameritrade makes no warranty or representation with respect to the service as to suitability or fitness for a particular purpose. In no instance should the listing of a third party be construed as a recommendation or endorsement by TD Ameritrade.

²Access to Roadmap is provided by TD Ameritrade Institutional as a service to financial advisors using the brokerage, execution and custody services of TD Ameritrade Institutional. TD Ameritrade does not guarantee nor is it responsible for the completeness or accuracy of the data provided by third-party firms or for the quality of any third-party firm's product or service.

³TD Ameritrade Institutional, Division of TD Ameritrade, Inc., member FINRA/SIPC/NFA.

⁴TD Ameritrade, Inc., member FINRA (www.finra.org)/SIPC (www.sipc.org)/NFA (www.nfa.futures.org) and TD Ameritrade Clearing, Inc., member FINRA/SIPC.

⁵Investtools, Inc. is an education subsidiary of TD Ameritrade Holding Corporation. Investtools does not provide financial advice and is not in the business of transacting trades. Investtools, Inc. and TD Ameritrade, Inc. are separate but affiliated companies that are not responsible for each other's services or policies.

⁶TD Ameritrade was ranked #1 and received an overall score of 5 stars (tied for first place with one other broker), in the Kiplinger's Online Broker Ratings, *Kiplinger's Personal Finance*, 02/2011. Fourteen brokers were rated in the categories: Costs, Web site usability, Investment choices, Customer service, and Research and tools.

⁷TD Ameritrade was awarded an overall 4 ½ out of 5 Stars and was named "Best for Option Traders" in *Barron's* 2011 Online Broker Survey, 03/2011. TD Ameritrade also received the highest rating, 4 ½ out of 5 stars, in the "Best for Long-term Investing" category, sharing that rating with only one other broker. TD Ameritrade was evaluated versus 23 other online brokers in eight total categories, including trade experience, trading technology, usability, range of offerings, research amenities, portfolio analysis and reporting, customer service and education and costs. *Barron's* is a registered trademark of Dow Jones & Company © 2006-2011.

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