



## **FOR IMMEDIATE RELEASE**

### At the Company

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## **TD AMERITRADE INSTITUTIONAL ANNOUNCES ADVISOR-CENTRIC INVESTMENTS**

*Enhancements designed to help make advisors more efficient and effective*

**Jersey City, NJ, March 5, 2008** – (Nasdaq: AMTD) TD AMERITRADE Institutional, a leading differentiator through flexibility and innovation, today announced a significant investment in initiatives focused on making an Advisor's business less complicated.

"Owning your own business can be complex, and at times you may need support," said Brian Stimpfl, managing director, TD AMERITRADE Institutional. "We are regularly providing new tools and resources designed to help an advisor work smarter, faster and at a lower cost."

### **Technology**

It is with this in mind that TD AMERITRADE Institutional will re-architect Veo, its robust advisor platform, throughout the coming year. With the expansion of real-time account views, advisors will be able to see real-time intraday balances, positions and history for both individual and consolidated account views. Enhanced cash management functions, new self-service options and operational alerts will allow advisors to control tasks like moving money electronically and have real-time access to the status of account applications while automatically receiving alerts by email.

"Veo Next Generation will deliver a more robust, customized experience for advisors," notes Stimpfl. "The self-service options and operational alerts keep client account information at an Advisor's fingertips, so their time spent with clients is more effective."

Advisors can expect to see the upgrades as soon as the summer of 2008.

### **Practice Management**

For Advisors looking to improve in the areas of practice management and business development, TD AMERITRADE Institutional will be hosting a series of workshops in various cities throughout 2008. Through a partnership with CEG Worldwide, these workshops will provide an in-depth look at the business practices that are being utilized by some of the leading advisors in the industry. The workshop series, based on CEG Worldwide's most recent research report, "Best Practices of Elite Advisors", will focus on client and asset acquisition, how to properly deliver valuable client service and the



importance of effective business systems and practices, including possible outsourcing and planning options.

Adding additional value to the sessions will be TD AMERITRADE Institutional's solutions consultants, who will translate these practices into real-terms in order to better relate and customize to an individual Advisor's practice. The consultants will be available to all advisors to answer their questions about building a differentiating and more efficient practice.

"Learning this information is one thing, and implementing is another," said Stimpfl. "Our consultants will provide key assistance and training, from technology to operations, to help Advisors get the most value out of a successful practice."

### **Investment Management**

TD AMERITRADE Institutional is expanding its offering of managed account services to advisors, including a Unified Managed Account (UMA) platform in conjunction with Placemark Investments, one of the largest independent providers of active overlay management services. Expected to be available in the summer of 2008, the program will leverage model portfolios and manager selection by Capital Market Consultants (CMC), a leading provider of open-architecture investment management solutions for advisors and their high net worth clients.

"The UMA is just one more program that will provide advisors with flexible, innovative choices to meet the investment needs of their clients," continued Stimpfl. "This can really help advisors differentiate themselves in their highly competitive markets."

In addition to the UMA, TD AMERITRADE Institutional is launching two new separately managed account solutions. The first, Separate Account Exchange (SAE) is a "supermarket" of separately managed account strategies, including all major capitalization segments, styles and asset classes. Advisors that want to do the structuring, researching and maintaining of their own managed account program can select their investment manager, negotiate manager fees and minimums directly with them and choose between asset-based or transaction-based pricing. The SAE is currently available to advisors.<sup>1</sup>

The second solution, expected to be launched this summer, will continue to leverage CMC for manager selection and include negotiated pricing with sub-advisors and a client proposal generation tool.

For more information on TD AMERITRADE Institutional, please visit [www.tdainstitutional.com](http://www.tdainstitutional.com).

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### **About TD AMERITRADE Institutional**

TD AMERITRADE Institutional is a leading provider of comprehensive brokerage and custody services to more than 4,500 fee-based, independent Registered Investment Advisors (RIAs) 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 (RIA) 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).

TD AMERITRADE, CEG Worldwide, Placemark Investments and Capital Market Consultants are all separate and unaffiliated companies and each is not responsible for the policies and services of the other.

<sup>1</sup>Separate Account Exchange is available to advisors working with TD AMERITRADE Institutional. TD AMERITRADE is not responsible for the accuracy of the data provided by each investment manager participating in the Separate Account Exchange program. The list of participating firms does not constitute an endorsement of the firm by TD AMERITRADE. Please contact the manager directly for the most recent information pertaining to their investment styles and management fees.

<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/SIPC, 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).