

Achieve Your Business Vision

Smart, Innovative, and Customizable Solutions for Independent Registered Investment Advisors (RIAs)

Choose a Strategic Relationship

Your success matters to you, and it matters to us. If you want to work with a team committed to your success—a team that understands what you do, recognizes your accomplishments, and can help you achieve even more—we invite you to get to know us and experience the TD Ameritrade Institutional difference.

Experience World-Class Service

To us, service isn't just a department—it's a mindset that all of our associates take with them into every interaction with you. Our committed professionals are empowered to help you make a difference in your business. We strive to surpass your expectations the same way that you go above and beyond for your clients.

You will work with experienced and accessible teams and find that our senior managers are always within reach. Your needs drive the service we provide. Dedicated teams collaborate with you to learn your business inside and out—an approach that helps us deliver the right resources, right when you need them.

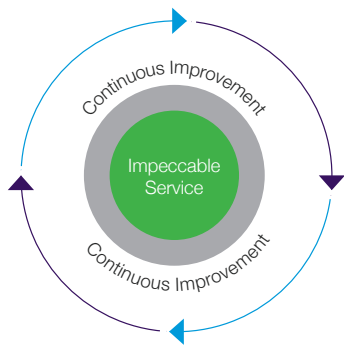
Our goal is to always truly understand how we can add value and earn our place as the service leader among custodians. We use a variety of channels to gather feedback and continually measure the quality of our customer service. That information becomes the basis for ongoing enhancements.

Delivering Impeccable Service

Delivering:
Achieve results



Taking Action:
Implement changes to meet your needs



Listening:
Measure interactions and seek your input



Evaluating:
Identify opportunities for improvement



Overview

TD Ameritrade Institutional is one of the top three RIA custodians in the industry, with over 4,500 advisors.¹ We are one of the fastest-growing custody firms due to our award-winning technology,² top-notch service, and practice management offerings.

- **Veo®**
Streamline your operations with our powerful core account management and trading platform, designed specifically for advisors.
- **iRebal®**
Sophisticated portfolio rebalancing that's customizable to your unique needs. Available as a fee-for-service solution to support multiple custodians, or FREE through Veo for accounts held with TD Ameritrade Institutional.
- **thinkpipes®**
Enrich your trading experience with an advanced platform that delivers streaming market data, real-time analytics, and robust charting features.
- **RIACoconnect®**
Use this service to connect with RIA firms that may be looking to buy, sell, or merge their practices—or to help you find new talent for your business.
- **Solutions Consultants**
This team of professionals will work closely with you to develop and implement an actionable, step-by-step plan to help you grow your business.

The TD Ameritrade Institutional Difference

We never forget that it's your business. We are here to support you in making it thrive. When you work with us, you will get the dedicated commitment of our people, access to a range of resources, and a strategic relationship—all designed to increase your potential and help you achieve your business vision.

Our offering is designed to meet your unique business needs and help you grow. It's one more way we demonstrate our commitment to your success, and one of the reasons many advisors choose us as their custodian.

Our Offering

Run My Business	Maximize My Business
Smart Operational Solutions Impeccable service, innovative technology, and sophisticated trading services designed to meet your demand for operational efficiency	Customized Practice Management Collaboration, expertise, and powerful practice management resources designed to help take your business to the next level
Manage My Clients' Wealth	Gain a Stronger Voice
Flexible Investment Solutions A broad range of investment products and planning solutions delivered through open architecture and created to serve your clients' best interests	Steadfast Advocacy Leadership and advocacy that represent the independent RIA point of view and give advisors a voice in shaping the regulatory environment

Connect with an experienced consultant today.

CALL 800-934-6124
VISIT tdainstitutional.com



1 Cerulli, RIA Marketplace 2014: Growth Drivers in an Accelerating Industry Segment, 2014.

2 http://www.financial-planning.com/news/technology/tech-survey-2015-whats-new-now-2691255-1.html?force_pg=/News/ December 1, 2014, stated: "Among custodians, TD Ameritrade Institutional still ranks No. 1 in overall technology satisfaction."

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