

Creating more opportunities for advisors.

The technology and workflow toolset provided by TD Ameritrade Institutional has helped empower **Nepsis Capital Management** to achieve significant growth in AUM and spend more time on high-value activities. The greater clarity and efficiency between advisory teams and support staff enables the team to do more with less, creating a scalable practice primed for future growth, and making it easier for advisors to do business with clients.



Nepsis Capital Management

The results

Net new asset growth in the past 18 months:

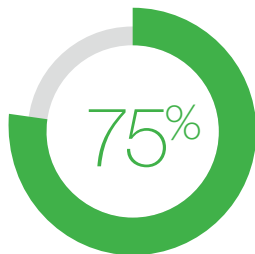


150%

New employees:



0



Annual growth rate, plus:

- Easier tracking of service-related issues
- More accurate status follow-up to advisors
- Improved speed of relaying information to clients

The technology used through the Veo® platform's open access capabilities

- Veo®
- Salesforce®
- DocuSign®
- Laser App®
- thinkpipes®
- iRebal®
- Finance Logix®
- Veo® Mobile

Connect with an experienced consultant today.

Call **800-934-6124** or visit tdainstitutional.com/openaccess

“One of the things that I have found consistent is TD Ameritrade’s ability and desire to make sure that we are getting the services we need to help us grow our business.

Most advisors hate doing paperwork. Using DocuSign and Laser App, and tying both into Salesforce, not only allows us to document everything and keep it organized, it also limits errors in the paperwork process.

Our 75% annual growth rate results from utilizing a structural foundation in a technology that gives us flexibility and transparency, allowing us to execute on our philosophy and our strategy.”

—Mark Pearson, President and CIO
Nepsis Capital Management

“We’ve taken this technology chassis and created a well-oiled machine, soup to nuts, back office to marketing and sales. And by making it more efficient, I have more moments in the day I can spend in front of my clients.”

—Mark Clark, Vice President
Nepsis Capital Management

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