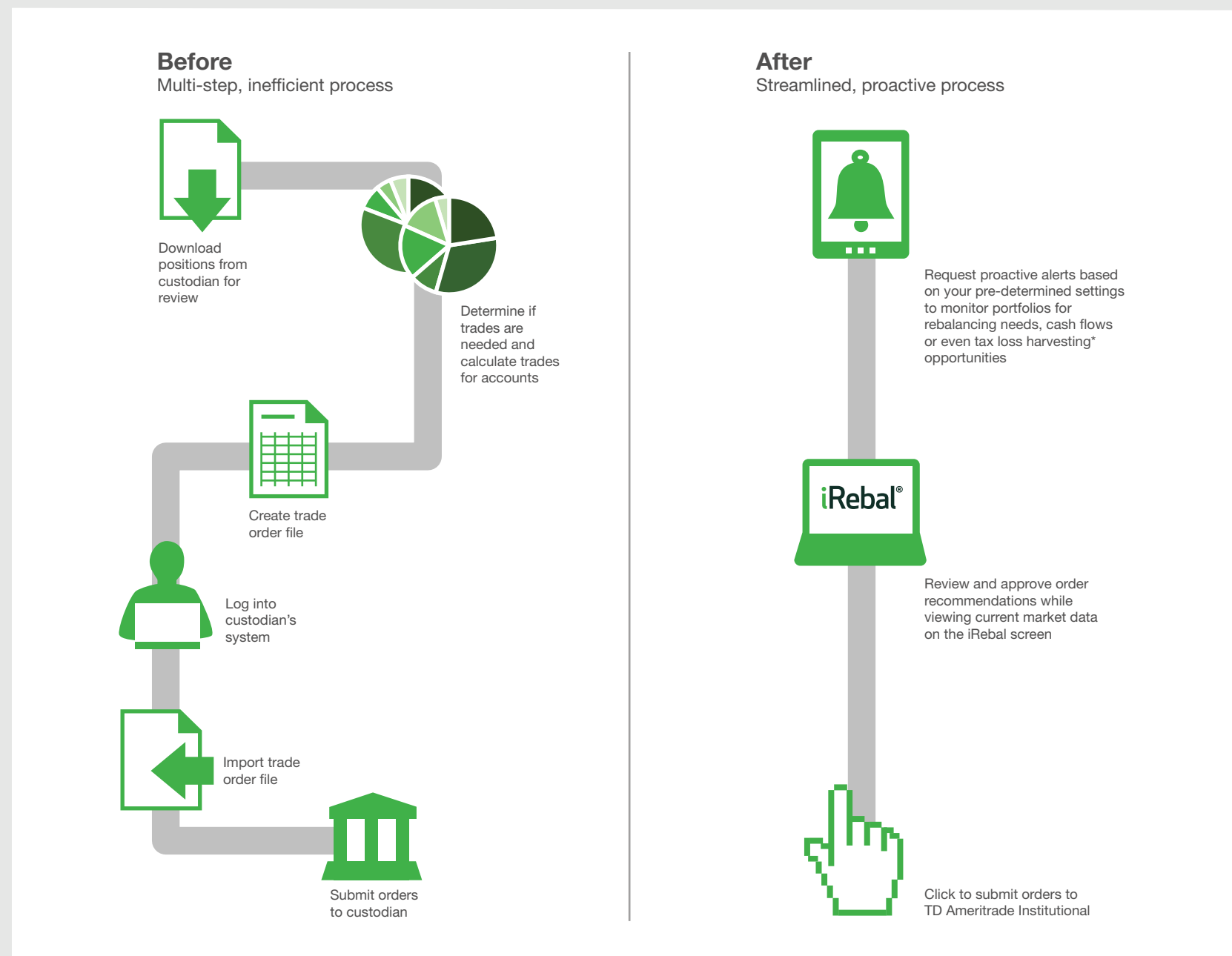


iRebal[®] is coming to Veo[®]

We have taken the complex and time-consuming process of rebalancing, and made it easy and efficient *for you*.



iRebal[®] on Veo[®] will be made available for FREE for all TD Ameritrade Institutional accounts

iRebal can enable advisors to gain efficiency and scale for normally inefficient processes, while bringing consistent portfolio management and service to their clients.

The Intelligent Rebalancer

- Customizable, rules-based program to automate complex rebalancing processes
- Simultaneously rebalances hundreds of accounts while considering unique client circumstances, tax consequences, restrictions and liquidity needs based on advisor rules
- Automatically generates trade recommendations for multiple-account level rebalancing, cash management, tax loss harvesting* and other flexible trading functions

Key Features

- Straight through processing of trades, including automated blocking and allocation
- Rebalancing across accounts at the household level
- Develop a "Model of Models" to create a custom blend
- Cash Management
- Tax loss harvesting
- Single security rebalancing
- Dynamic replacement of securities
- Ability to create custom rules, security equivalencies and restrictions
- Customizable, automated portfolio monitoring
- Proactive rebalancing alerts when action is recommended based on advisor rules



Call 800-934-6124
to learn more about iRebal today.

*iRebal offers a flexible tax harvesting feature that allows you to set various loss thresholds for taxable accounts, total loss targets for portfolios, and choose a replacement security for each harvested security. Once the thresholds have been set, iRebal identifies eligible losses in taxable accounts, and proposes orders for securities that you have defined.

TD Ameritrade does not provide tax advice. We suggest that you seek the advice of a qualified tax-planning professional with regard to your personal circumstances.

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