

TD Ameritrade Generation Next RIA Program

Working hard for advisors, for investors and for the financial planning profession

Experience the benefits of the TD Ameritrade Generation Next RIA Program

Your goal is to be your clients' trusted advisor. Ours is to help you achieve that. Program resources are aimed at attracting young advisors and diverse talent to the financial planning profession—to help the RIA industry better reflect the communities we serve and to help you forge connections to the next generation of clients.

What resources are available?

Access resources designed to build awareness of the RIA model, develop the next generation of advisors and support existing advisors:

- **Watch videos from real advisors on why they chose to be an RIA.** Our collection of stories features advisors who talk passionately about the families they help and about what inspires them. It reminds all of us that finance is about people, not numbers—and it creates greater understanding of what it means to be an RIA.
- **Connect with the next generation talent on the RIA NextGen Career Exchange.** NextGen advisors can play an important role in how you meet clients' evolving needs. Look to resources for engaging with the next generation such as the RIA NextGen Career Exchange, powered by TD Ameritrade Institutional. The career exchange connects advisors and candidates to independently explore RIA job and internship opportunities.
- **Find relevant content from industry experts such as the XY Planning Network.** Everyone has a part to play in making our industry more attractive. Look to XY Planning Network, which helps support and encourage up-and-coming fee-only financial advisors who are looking to forge a new path in the industry.

The RIA generational shift



Sources:

*The Cerulli Report: US Advisor Metrics 2016: Combatting Fee and Margin Pressure.

**The 2017 FA Insight Study of Advisory Firms: People and Pay, TD Ameritrade.

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- **Learn about our scholarship and grant program.** Our industry needs a new generation of talent to fill financial advisor jobs. We're intent on developing it. Each year we give NextGen RIA Scholarships to 12 deserving students, including two scholarships focused on diverse candidates. And we award grants to universities demonstrating a commitment to educating the industry's future financial professionals. The goal? Encourage the next generation to become financial advisors, pave the way for the future of our industry.

Learn more

Visit tdainstitutional.com/nextgen.

Connect with an experienced consultant today.

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