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Big Plans for Big Data: TD Ameritrade Institutional to Launch Veo One Analytics, Putting Information to Work for Independent RIAs

RIAs to Get Valuable Benchmarking Tools and Business Diagnostics Delivered to Their Veo One Desktop

SAN DIEGO, Calif., Feb. 2, 2017 – What if your business could communicate with you the same way as today's cars, revealing the best route and alerting you to hazards? What if advisors could have access to a virtual data and analytics assistant, by their side whenever business decisions need to be made?

That's the thinking behind TD Ameritrade Institutional¹ Veo One[®] Analytics, an on-demand data analytics engine that can drive improved business performance with timely data that's personalized, simplified and delivered to an advisor's desktop. Better still, it can eliminate the need for advisors to dig through lengthy reports and research papers to uncover the information relevant to their firm.

Veo One Analytics will provide advisors greater insight into their clients, business operations, growth factors and financial performance and then align those insights to specific actions and educational resources.

"Data and analytics can save time and help us perform better in many aspects of our lives. Now RIAs can get personalized data-driven insights to help take their businesses to the next level," said John Ruda, managing director of strategic planning and analytics at TD Ameritrade Institutional. "Veo One Analytics can serve as a data dashboard, giving advisors direct access to a growing collection of analytics tools that will make it easier to benchmark performance against peers, get the facts needed to make smarter decisions and react faster to market opportunities."

Advisors already have access to personalized analytics snapshots, focused on some key business drivers, through their TD Ameritrade strategic relationship manager. Now TD Ameritrade Institutional will be rolling out a series of analytics tools and dashboards directly to advisors through Veo One.

FA Insight Benchmarking Tool

The first of these offerings will be the FA Insight Benchmarking Tool, powered by more than a decade of industry data collected by FA Insight, a leading advisor research firm acquired by TD Ameritrade last year. Advisors can get a personalized view into key business metrics, spanning people and productivity, growth and income, and operational efficiency, all compared to their relevant peer group.

The tool then takes those results and suggests actions for RIAs to explore and connects them to TD Ameritrade Institutional resources that can help them get started.

"Our goal is to provide advisors with essential business data and give them a clear sense of how they stack up against peers and the industry's top performers," said Vanessa Oligino, director of Business Performance Solutions at TD Ameritrade Institutional. "Best of all, we give advisors a plan of action plus

education resources that can help them enhance growth, increase efficiency and deliver a better client experience, backed with personal, ongoing guidance of our business performance consultants.”

Advisors attending National LINC 2017 can get a demonstration of the FA Insight Benchmarking Tool and receive a customized benchmarking report.

Additional New Applications

Over time, TD Ameritrade Institutional will provide RIAs access to a wide collection of custom reports, diagnostic tools and dashboards. Later this year, for example, the Veo One Analytics suite will introduce an operational efficiency dashboard to help advisors identify and tackle their top service disruptions. This dashboard can help pinpoint the source of a firm’s issues, limit rework required by staff and, ultimately, help RIAs deliver a better client experience.

Future analytics applications can include tools that offer deeper insights into client demographics, operational efficiency and money in motion, all with an eye toward relevant peer benchmarking.

“There is a mountain of information out there, so we aim to simplify data into easy-to-understand insights, align those insights to action and help advisors run better businesses,” Ruda continued. “By breaking big data down into smaller, actionable insights, we can empower more advisors pursue their goals.”

To Learn More

To learn more about Veo One Analytics or the FA Insight Benchmarking tool, TD Ameritrade Institutional clients can contact their sales representative or relationship manager. Advisors who are not clients can call (800) 934-6124 or visit www.tdainstitutional.com.

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