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## **TD Ameritrade Institutional Gathers Leading Technology Innovators to Take Veo One® to the Next Level**

*AdvisorEngine and RightCapital Named 2017 Veo Integrated Award Winners*

**SAN DIEGO, June 28, 2017** – Many hands make light work, the saying goes, so it follows that bringing together dozens of innovators can lead to game-changing technology for independent advisors.

This week, dozens of leading technology executives and developers gathered in San Diego for the 8<sup>th</sup> annual TD Ameritrade Institutional<sup>1</sup> Tech Summit to collaborate on ways to make our industry-leading advisor technology even more useful and powerful.

When TD Ameritrade Institutional took the open road in 2010 and invited technology companies to get on board, the result was [Veo Open Access®](#), a platform repeatedly ranked tops in satisfaction<sup>2</sup> and which today features integrations with 119 third-parties. Last year we took our technology to the next level with [Veo One®](#), a game-changing platform that lets advisors manage all their technology tools from one desktop and one log-in.

We're committed to extending that lead by continually adding new functionality to deliver advisors a superior client experience.

"The initial version of Veo One we [launched](#) last year represents a giant leap forward for independent RIAs, but we're not done yet," said Jon Patullo, managing director of technology products and solutions at TD Ameritrade Institutional. "Now, and for years to come, we'll be adding new Veo functionality, expanding the number of integrated technologies and exploring new ways to make Veo One work harder and smarter for all our clients."

RIAs that have adopted Veo One benefit from deep integrations with 15 of the most widely used CRM, financial planning, portfolio management and other applications. Yet Veo One is designed to be ever-evolving, always improving, helping advisors to take advantage of the latest tech trends.

TD Ameritrade Institutional is working to facilitate future third-party integrations through the use of "co-creation," a process that lets technology firms develop innovations through Veo One more quickly. We are also working to deliver complete Veo functionality, to allow all advisors on our platform to get the full benefit of Veo One. And we're developing new capabilities, such as a "status tracker" integration platform that lets technology firms show the progress of new account openings and money transfers at TD Ameritrade within their own systems.

### **Veo Integrated Awards**

TD Ameritrade Institutional also announced winners of its 4th annual Veo Integrated Awards, which recognize firms doing the most to leverage integrated technology. This year's winners are AdvisorEngine, winner of the Innovation Award, and RightCapital, winner of the Advisor Satisfaction Award.

AdvisorEngine in the past year has expanded its Veo-integrated capabilities, offering advisors an online advice solution to improve the technology experience of traditional offerings or function as a separate "robo-advisor" for select clients. Through AdvisorEngine, which also is integrated with iRebal, advisors can open accounts, transfer cash, generate billings and sync up investment models.

AdvisorEngine has also leveraged Veo Open Access Advanced Alerts, a ground-breaking intraday alerting system that notifies advisors when clients update information or conduct transactions in their accounts, resulting in fewer steps for advisors to take to complete daily tasks.

For our second award, TD Ameritrade Institutional surveys advisors who custody assets on the Veo platform to measure their satisfaction with the technology systems they use. RightCapital, provider of financial planning software to advisors, received the highest advisor satisfaction score based on the responses of 550 advisors. RightCapital, which offers technology that simplifies the financial planning experience for clients, has been gaining market share among independent advisors and getting high marks in advisor polls.

## Integration Evolution

TD Ameritrade Institutional in 2010 became the first custodian to open its independent advisor platform to third-party software firms, an approach giving independent advisors flexibility and choice when it comes to the technology they use. The Veo One platform takes that commitment to integration and collaboration even further, enabling RIAs to move easily from application to application all within the same view.

Veo One helps independent advisors complete common tasks with fewer clicks and learns to deliver the information they need when they need it. Veo One is also designed to be accessible anytime, anywhere, on any device.

Veo One is currently integrated with 15 widely used technology tools -- AdvisoryWorld, Black Diamond, DocuSign, eMoney Advisor, Envestnet Finance Logix, iRebal, Junxure Cloud, Laser App Anywhere, Laserfiche, MoneyGuidePro, Morningstar, Orion Advisor Services, Redtail Technologies, Salesforce, and Thinkpipes – with many more on the way.

To learn more about Veo One, visit our [website](#) or call TD Ameritrade Institutional at (800) 934-6124.

*The Innovation Award is based on a number of criteria, including depth of integration with Veo, integrations with other third-party applications and the scope of independent advisor adoption. Winners were selected by a committee of TD Ameritrade associates, whose methodology was reviewed by independent consultant Joel Bruckenstein of Technology Tools for Today.*

*Access to the Veo platform's open access capabilities is provided as a service to independent advisors using the brokerage, execution and custody services of TD Ameritrade. Veo Open Access is an indication of potential programming compatibility. It does not imply any TD Ameritrade, Inc. recommendation of, endorsement of, warranty of, or fitness for use of any third party's products or services. TD Ameritrade is not responsible for information, opinions or services provided by a third party. Since TD Ameritrade must ensure that all vendors meet security requirements, integration with new vendors is not immediate and cannot be guaranteed.*

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### About TD Ameritrade Institutional

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<sup>1</sup> TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation.

<sup>2</sup> *Financial Planning* magazine annual advisor technology survey, 2012-2014.

**Source: TD Ameritrade Holding Corporation**