



RIAConnect[®] on Veo One[®]

Make connections that can help
keep your business moving.

TD Ameritrade
Institutional

Pursuing your business goals **just got easier**

Creating connections is an essential part of pursuing your professional objectives. RIAConnect is an online community and matching tool designed to make forming those strategic relationships easier than ever.

Whether you're looking for M&A opportunities, getting ahead of succession planning, or hiring new talent, RIAConnect may help you get there.

This innovative digital platform uses advanced technology to make matches based on what you tell us you are looking for. It allows firm principals and those they grant access to connect anonymously, online, for free—and it's conveniently located right on our Veo One® platform.

Ready to make connections that may take your business to that next level? Keep reading to learn how RIAConnect can help.



For firms exploring M&A

Make connections that can help grow your business.

Merger and acquisition activity increased 60% in 2019—and two-thirds of those deals were led by RIAs.¹ Firms looking for opportunities to grow their businesses via M&A can expand their professional networks by joining the RIAConnect community:

- **Advisors are connected** by a matching algorithm based on shared goals and preferences.
- The system **automatically serves up matches based on criteria you define**—no need to sift through hundreds of profiles manually.
- **Interactions in the community are anonymous** until users decide otherwise, so you can more freely discuss your goals.
- Firm principals and business development officers can use this insightful resource to **identify growth opportunities**.

¹ FA Insight, “Mergers & Acquisitions Activity: 2019 Year-End Update,” January 2020.



For help with succession planning

Make connections that can help
secure your firm's future.

A solid succession plan is crucial to the future of any firm. Yet research shows that less than 50% of all firms have an adequate plan in place.² If yours is one of them, joining the RIAConnect community may help you:

- **Get one step closer to solidifying your plans** by filling out your in-depth profile.
- **More easily and efficiently connect with potential successors or firms to sell to** via a streamlined matching experience integrated onto Veo One.
- **Access educational resources** on the ins and outs of succession planning and a variety of other topics.
- **Connect with firms and Advisors who have compatible goals** and values in your pursuit for the continued success of your business—and your vision.

² FA Insight, *Succession Planning: Beyond Ownership Transition, It's a Smart Human Capital Strategy*, 2018.

For firms seeking new talent



Make connections that can help move
your business forward.

Recruiting high-performing, diverse talent is getting tougher all the time. Whether you're searching for younger NextGen talent, women, diverse candidates, career changers, caregivers, parents, or military returning to the workforce, RIAConnect may help you connect with candidates who are a good fit for your firm:

- Your RIAConnect profile gives you **access to a pool of NextGen talent** actively seeking career opportunities within the financial advice industry.
- Unlike other Advisor hiring tools, RIAConnect allows firms to **connect directly via secure messaging**.
- Search and hire smarter with **matches based on potential compatibility** of individual priorities, firm philosophy and culture, preferences, goals, and more.

NextGen candidates can access RIAConnect NextGen and create their profiles at tdariaconnect.com/nextgen.

A digital community built with **your needs in mind**



Access RIAConnect easily from Veo One.

Our goal is to make connecting as efficient as possible for you. That’s why we’ve integrated the RIAConnect community onto Veo One. Access is fast, easy, **free**—and already part of the platform you use every day:

- **Only firm principals** and those they grant access can join the community, so sensitive discussions stay confidential within your firm.
- To get started, go to the RIAConnect tab under **Tools and Resources** on **Veo One** to request access.
- Forty-eight to seventy-two hours later, **RIAConnect will appear in the Vendors and Other TD Ameritrade Applications** drop-down menu in the top right corner.



Trust the technology to do the legwork.

- **Tell us about yourself.** Your in-depth matching profile includes information about your experience, your firm, your goals, and what you’re looking for in a match.
- **Get matched.** The advanced algorithm used automatically adds people and firms to your match list.
- **Manage your matches.** Rate your own matches, share them with your colleagues, and initiate contact if desired.



Stay anonymous until you decide otherwise.

With RIAConnect, every interaction is anonymous, so you can connect with confidence. Reveal your identity to any matches you want, whenever you want—but until then, you'll be known only by your profile ID number. This takes the pressure off when addressing sensitive topics with your matches, such as succession planning, M&A, hiring, and more.



Make the most of your connections.

Access educational resources and support from your TD Ameritrade Institutional Relationship Manager to help you take the appropriate actions as you connect with other firms and Advisors on RIAConnect. Visit the [Education Center](#) or contact us at 800-934-6124 for more information.

Not active on Veo One yet? Get started today.

Just visit veoone.tdainstitutional.com, log in with your Veo® credentials, and start exploring RIAConnect as well as all the other great features Veo One has to offer.

Not a TD Ameritrade Institutional client yet?
Contact us [here](#) to join.

Ready to start making connections?

Join the RIAConnect community from Veo One today, and contact riacconnect@tdameritrade.com with any questions.



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