



**Media Contact:**

Joseph A. Giannone  
Communications + Public Affairs  
201-369-8705  
joseph.giannone@tdameritrade.com

**TD Ameritrade Institutional Expands Award-Winning Model Market Center™ With More Investment Portfolios From More Model Providers**

*The Industry's First Model Portfolio Marketplace Now Offers 328 Strategies  
From 35 Investment Managers*

**JERSEY CITY, N.J., Sept. 10, 2019** – Gone are the days when access to ideas from leading asset managers was reserved only for the largest institutional investors. Thanks to innovations such as the TD Ameritrade Institutional<sup>1</sup> Model Market Center, independent registered investment advisors (RIAs) can tap similar resources through an expanding universe of institutional-grade investment strategies.

The TD Ameritrade Institutional Model Market Center now offers a total of 328 investment model strategies from 35 third-party providers.

Model Market Center, the award-winning model marketplace<sup>2</sup> platform, originally launched in 2017 as one of the RIA industry's first digital supermarkets for accessing third-party investment model provider strategies without the typical constraints, complexities and costs<sup>3</sup> associated with investment management outsourcing solutions. Since the launch, 3,200 subscribers have signed up to use the platform.

“Advisors told us they want more choices, so we’ve built out our platform to include more investment strategies from a broader universe of providers, and this latest expansion is only the beginning,” said Dani Fava, director of innovation at TD Ameritrade Institutional. “With Model Market Center, RIAs can leverage the strategies of some well-known money managers to help construct portfolios and devote more time to serving clients.”

**More Models, New Research Tools**

Model Market Center's expanded platform adds 24 new model providers, an additional 232 strategies, and a new, two-tier structure. Tier One portfolio models are available at no additional cost and are typically invested in ETFs and mutual funds.

Now advisors also have access to Tier Two models that include a wider range of securities, including individual stocks. These models have a management fee associated with them, set by each model provider, with pricing that is comparable to similar platforms.

Not only does Model Market Center offer more models, but it provides access to 3<sup>rd</sup>-party tools to help RIAs as they conduct their model research. Available at no additional charge is an institutional-grade modeling and investment analytics tool from FinMason to help advisors measure potential model risk and inform their research on which strategies may align with their client's goals.

Advisors can access quantitative data on the models from Informa through its PSN investment manager database. Research reports from model providers also are available from Informa's WealthIQ system.

### 35 Providers, With More to Come

The expanded line up of model portfolio providers now includes:

- Advance Capital Management\*
- AGFiQ Asset Management\*
- Anchor Capital Advisors LLC\*
- Anchor Capital Management Group, Inc.
- Anfield Capital Management\*
- Aptus Capital Advisors\*
- Auour Investments\*
- BlackRock\*
- Cabana Asset Management\*
- Cambria Investment Management, Inc.
- Capital Market Consultants, Inc.\*
- Clark Capital Management Group\*
- CLS Investments, LLC
- Eagle Ridge Investment Management\*
- Efficient Market Advisors, a Business of Cantor Fitzgerald Investment Advisors\*
- First Trust Portfolios\*
- Global X ETFs\*
- Goldman Sachs Asset Management
- Horizon Investments, LLC\*
- Invesco Advisers, Inc.\*
- J.P. Morgan Asset Management\*
- Julex Capital Management, LLC\*
- KKM Financial, LLC\*
- Meeder Investment Management
- Miller/Howard Investments, Inc.\*
- Northern Trust Investments, Inc.\*
- Nuveen
- Redwood Investment Management, LLC
- Russell Investments
- Schafer Cullen Capital Management\*
- State Street Global Advisors
- W.E. Donoghue\*
- Wilshire Associates Inc.
- WisdomTree Asset Management, Inc.
- Zacks Investment Management\*

*\* New providers added since May 2018*

### Equipping RIAs to Serve Clients Better

Investment management options have evolved since the first mutual funds were launched in the 1920s, followed by the introduction of managed accounts and ETFs. Model Market Center represents an evolution of the approach to investment management, by letting RIAs tap the portfolio construction expertise of third-party providers to research and build portfolio models while still retaining fiduciary control and management responsibility, flexibility and trading discretion.

“Model Market Center is a phenomenal, cost-effective solution for helping provide certain clients with great investment advice and strategy,” said Jamieson Grabenhorst, owner and founding partner of Horst & Graben Wealth Management in Lake Oswego, Oregon. “And the way we can seamlessly implement ideas through integration with iRebal is tremendous. TD Ameritrade Institutional’s integrated technology has allowed us to streamline our business operations, helping our firm to grow at a much faster pace.”

Advisors can access research and subscribe to the third-party investment models in one central location on Model Market Center and download them directly into iRebal® on Veo® -- TD Ameritrade Institutional’s powerful portfolio management technology -- to execute on those models in the manner they choose. Advisors can implement one model or blend multiple models based on the needs of each client account. As providers update their models, changes are communicated to advisors via the Model Market Center.

Model Market Center can free up time for do-it-yourself advisors who build models from scratch, so they can devote more time to research and working with clients and financial planning. The platform, likewise, can be a less-costly alternative for advisors who outsource to traditional third-party management platforms.

Model Market Center also makes research materials from the third-party model providers available to assist with an advisor’s due diligence. It displays the net expense ratio and trading costs for each model, offering greater transparency around total cost of ownership.

“Creating investment models can be time-consuming. And while performance is top of mind, investors want their advisors to offer more than just investment management,” said Fava. “The enhanced Model Market Center is another TD Ameritrade Institutional innovation that can help independent advisors optimize their business and keep pace with accelerating technological change.”

## To Learn More

TD Ameritrade Institutional clients can contact their relationship manager to learn more or click [here](#). Other advisors are invited to call (800) 934-6124 or learn more about Model Market Center at [www.tdainstitutional.com](http://www.tdainstitutional.com).

###

- 1 TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation.
- 2 2018 Wealth Management Industry Award, Model Market Places – TAMP
- 3 Standard TD Ameritrade Institutional custody fees and fund management fees apply. For models that charge a Strategist Fee: The Strategist Fee, in basis points, is set by the Model Manager and can be seen directly on the model page in the Model Market Center.

Jamieson Grabenhorst is separate from and not affiliated with TD Ameritrade Institutional and has not received remuneration for participation in providing his testimonial. Advisor testimonials may not represent the experience of all advisors using TD Ameritrade brokerage services. More information about advisors is available on the SEC website ([www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)).

Model Market Center is an offering of TD Ameritrade, Inc. Registered Investment Advisor (RIA) that leverages iRebal® on Veo® technology to provide independent RIAs access to model portfolios provided by third-party asset managers. iRebal products and services are property of ThinkTech, Inc., an affiliate of TD Ameritrade, Inc. Brokerage services provided by TD Ameritrade, Inc., member FINRA ([www.FINRA.org](http://www.FINRA.org)) / SIPC ([www.SIPC.org](http://www.SIPC.org)) TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank. © 2019 TD Ameritrade.

Material made available through the Model Market Center is provided by third-party Model Managers and information providers who are separate from and unaffiliated with TD Ameritrade. TD Ameritrade has not paid for or been involved in the preparation of the content, and has not verified, endorsed or approved the content. TD Ameritrade assumes no responsibility for any fact, recommendation, opinion or advice contained in any such model portfolio or materials and expressly disclaims any responsibility for any investment decisions or for the suitability of any security or transaction based on it. Any mention of specific managers and/or models should not be considered an endorsement or recommendation by TD Ameritrade. Users of Model Market Center are responsible for all upfront and ongoing manager and model due diligence.

TD Ameritrade receives remuneration from ETFs and mutual funds and/or their managers that participate in the MMC for administrative and/or other services.

## About TD Ameritrade Institutional

[TD Ameritrade Institutional](#) empowers more than 7,000 independent registered investment advisors to transform the lives of their clients. It provides powerful technology and resources that help simplify running a business and let advisors spend more time doing what matters most — serving their clients. Through meaningful innovation, steadfast advocacy and unwavering service, TD Ameritrade Institutional supports RIAs as they build businesses that positively impact their clients and communities. TD Ameritrade Institutional is a division of TD Ameritrade, Inc., member FINRA/SIPC, a brokerage subsidiary of TD Ameritrade Holding Corp.

## About TD Ameritrade Holding Corporation

TD Ameritrade provides [investing services](#) and [education](#) to more than 11 million client accounts totaling approximately \$1.3 trillion in assets, and [custodial services](#) to more than 7,000 registered investment advisors. We are a leader in U.S. retail trading, executing an average of approximately 800,000 trades per day for our clients, more than a quarter of which come from mobile devices. We have a proud [history of innovation](#), dating back to our start in 1975, and today our team of 10,000-strong is committed to carrying it forward. Together, we are leveraging the latest in cutting edge technologies and one-on-one client care to transform lives, and investing, for the better. Learn more by visiting TD Ameritrade's [newsroom](#) at [www.amtd.com](http://www.amtd.com), or read our stories at [Fresh Accounts](#).

## Source: TD Ameritrade Holding Corporation