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TD Ameritrade Institutional's Veo One® Wins 2020 Wealth Management Industry Award for Custodian Technology

Model Market Center® secures its second Wealth Management Industry Award for outstanding achievement among investment-model marketplaces

JERSEY CITY, N.J., Sept. 16, 2020 – [TD Ameritrade Institutional](#)¹ is pleased to announce that **Veo One**®, the next-generation advisor platform that consolidates an advisor's technology tools into a unified, fully integrated experience, has received the [2020 Wealth Management Industry Award](#) for technology from *Wealth Management*, an independent news organization covering the financial advice business.

The award recognizes Veo One for outstanding achievement in technology among custodians with \$25 billion or more in assets. Over the past year, TD Ameritrade has made significant enhancements to the platform, including faster overall performance and increased third-party technology integrations. Veo One also now offers new features and functionality, including an AI-powered Virtual Agent for anytime service support; screen-sharing capabilities for advisors, clients and TD Ameritrade associates; streamlined access to loans; benchmarking tools; on-demand education resources; and fully digital new-account opening.

“Just as investors rely on independent RIAs, advisors embrace technology to help them drive greater efficiencies, accelerate growth and deliver the best possible experience to clients,” said Jon Patullo, Managing Director, Technology Solutions, at TD Ameritrade Institutional, and *Wealth Management's* 2019 Chief Technology Officer of the Year. “Working closely with technology providers and advisors every step of the way, we’ve created a game-changing platform that offers access to an expanding menu of innovative technology tools and brings them together in one seamless, fully-integrated ecosystem.”

Veo One, built on state-of-the-art technology, offers advisors a significant upgrade to the legacy Veo platform and takes open-access to the next level. Veo One is the culmination of years of close collaboration with advisors and industry-leading developers. With one sign-on, advisors can access dozens of third-party solutions seamlessly. Veo One is now accessible to all RIAs that custody with TD Ameritrade, which includes more than 46,000 users at over 7,000 advisory firms.

Model Market Center Wins Again

TD Ameritrade Institutional also received a Wealth Management Industry Award for **Model Market Center**® in recognition of the program's expansion and enhancements introduced in the past year.

Model Market Center, introduced in 2017, gives advisors access to no-fee ETF and mutual fund models, as well as strategist-fee equity investment models³, all built by third-party money managers. The platform received a Wealth Management Industry Award in 2018.²

Through a seamless integration with **iRebal**®, TD Ameritrade Institutional's award-winning^{4,5} investment management platform, advisors can select, blend and customize models from the Model Market Center menu to put these strategies to work on client portfolios. Advisors now can also leverage the FinMason Model Impact Tool, a third-party application to help advisors analyze the potential impact of strategies on client portfolios.

Since its launch in 2017, TD Ameritrade Institutional more than doubled the scope of Model Market Center by introducing dozens of models from investment strategists as well as onboarding additional strategies and fund

managers. Model Market Center now offers more than 500 models from 60 model managers, whose strategies and allocations have been put to work in client portfolios totaling \$5 billion in assets.

“We believe technology can streamline tasks and help advisors better manage their day, so they can focus on higher value work, such as spending more time with clients and building new relationships,” said Joe Barone, Director, Managed Account Solutions, TD Ameritrade Institutional. “With Model Market Center, advisors can offer clients access to a growing menu of portfolio strategies from money managers, while they maintain responsibility and control over client accounts.”

Technology Leadership

TD Ameritrade Institutional has long played a leadership role in technology, collaborating closely with advisors and with the “Veo Village” community of technology innovators. It was the first advisor custodian to embrace open-architecture technology with the launch of Veo Open Access in 2010, a platform that today offers advisors the flexibility of 180 third-party integrations with legacy Veo.

There’s also iRebal on Veo, the powerful portfolio re-balancing and management software offered at no charge to advisors who custody with TD Ameritrade, as well as **thinkpipes**, the professional-grade investment management platform, and **AdvisorClient.com**, a next-generation client portal for investors working with RIAs.

“For more than 25 years, we’ve been committed to developing and delivering the technology independent RIAs need to run better businesses,” said Jim Dario, Managing Director, Product Management, TD Ameritrade Institutional. “We deliver meaningful innovation designed to help firms deliver a better overall experience, fuel growth and compete in a marketplace that expects all the convenience and capabilities made possible by advanced technology.”

Now in its sixth year, the Wealth Management Industry Awards honor outstanding achievement by companies, organizations and individuals that support the pursuit of success by financial advisors.

To Learn More

For more information about Veo One, Model Market Center and other innovative TD Ameritrade Institutional technology, visit <https://www.tdainstitutional.com/offerings/technology-platforms.html> or call **800-934-6124**.

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¹ TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation.

² <https://www.amtd.com/news-and-stories/press-releases/press-release-details/2018/TD-Ameritrade-Institutional-Model-Market-Center-Receives-a-Wealth-Management-Industry-Award-for-Model-Marketplaces/default.aspx>

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.

⁴ <https://events.wealthmanagement.com/previous-events/industry-awards/2015-winners/>

⁵ <https://events.wealthmanagement.com/2019-winners/>

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.

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 Institutional, Division of TD Ameritrade, Inc. member FINRA / SIPC. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank ©2020 TD Ameritrade.

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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 approximately 13 million client accounts totaling approximately \$1.5 trillion in assets, and custodial services to more than 7,000 registered investment advisors. We are a leader in U.S. retail trading, executing more than 3.5 million daily average revenue trades per day for our clients, one-third 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 nearly 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 and read our stories at [Fresh Accounts](#).

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