The TD Ameritrade Institutional

Technology ecosystem

Veo One®

As the next generation of open architecture, Veo One allows you to bring your Veo One integrated third-party applications onto one platform to work, login, one view, and one unified experience. Veo One provides:

- Customizable views
- One-click access to alerts, tasks, and calendars
- Client Center with account- and customer-level views of all client activity
- Summary page with access to customer relationship management (CRM), financial planning, and portfolio management data
- Drag-and-drop functionality among integrated applications
- User-based configurations to increase efficiency throughout your entire firm
- Multistandard data feeds from third-party applications
- Core functionality, including: view opening, account management, and trading
- Convenient market research center

Veo Open Access®

Enjoy integration with the flexibility to choose the applications that are right for you. Veo Open Access offers Advisor one open architecture capability to bring your preferred third-party applications onto one platform with one login, one view, and one unified experience. Veo Open Access provides:

- Technology applications onto one platform with one login
- Enables you to bring your Veo One integrated third-party applications across multiple applications
- User-based configurations to increase efficiency throughout your entire firm
- Core functionality, including: view opening, account management, and trading

Veo® Integration Analyzer™

Designed specifically for Advisors, thinkpens deliver complete outputs flexibly, streamlining account data, non-front office analytics, and backend charting features.

AdviserClient®

A user-friendly online experience for your clients. Give your clients the ability to view their account balances, positions, transaction history, and more within your natural client website and mobile app.

iRebal®

Portfolio rebalancing that adapts to your needs. Spend less time researching and more time with clients. iRebal was created to offer you more effective portfolio management design for low-efficiency portfolios. “iRebal is fast, rewarding, and more than just rebalancing.”

Thinkpens®

Finish your trading experience with an advanced and intuitive platform. Designed specifically for Advisors, thinkpens deliver complete outputs flexibly, streamlining account data, non-front office analytics, and backend charting features.

Now that you know more about our core technology platforms, you may be curious how efficient your technology mix is. Try the Veo® Integration Analyzer™ to help you better identify the technology solutions that are best designed to work together and keep your firm productive.

Want to learn more about working with TD Ameritrade Institutional to incorporate the right mix of technologies into your firm? Call 800-934-6124 today.

The RIA model is all about freedom—including the flexibility to use the applications you prefer. That’s why we’ve developed a number of innovative technologies that can integrate with over 175 third-party applications.

Veo® Integration Analyzer provides a way to evaluate the performance of your platform. By using the tool, you can:

- Get more from your existing technology investment by integrating many of the third-party software tools you already use
- Choose a series of 175 technology providers to find the applications best suited to your unique requirements
- Create streamlined workflows by accessing data across multiple applications
- View real-time TD Ameritrade account data, alerts, and reports via your preferred applications

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