

Technology ecosystem

Veo One®

As the next generation of open architecture, Veo One enables you to bring your Veo One integrated third-party technology applications onto one platform with one 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 your relationships
- 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
- Multicustodial data views from third-party applications
- Core functionality, including new account opening, account management, and trading
- Convenient market research center

A quick and easy list of TD Ameritrade Institutional and third-party applications and how they integrate with Veo One.

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.

Technology at TD Ameritrade Institutional

AdvisorClient®

A user-friendly online experience for your clients.

Give your clients the ability to view their account balances, positions, transaction history, and more within our secure client website and mobile app.

iRebal®

Portfolio rebalancing that adapts to your needs.

Spend less time rebalancing and more time with clients. iRebal was created to offer you more effective portfolio management designed for tax-efficient rebalancing, dynamic cash management, tax loss harvesting,* and more.

thinkpipes®

Enrich your trading experience with an advanced and intuitive platform.

Designed specifically for Advisors, thinkpipes delivers complex options functionality, streaming market data, real-time portfolio analytics, and robust charting features.



Veo Open Access®

Enjoy integration with the freedom to choose the applications that are right for you. Veo Open Access offers Advisor-centric open architecture capabilities to bring enhanced flexibility, choice, and efficiency to the way you conduct your business.

- Gain more from your existing technology investment by integrating with many of the third-party software tools you already use
- Choose from a list of over 175 technology providers to find the applications best suited to your unique requirements
- Create seamless daily workflows by accessing data across multiple applications
- View real-time TD Ameritrade account data, alerts, and reports in your third-party applications



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.

*iRebal offers a flexible tax harvesting feature that allows you to set various loss thresholds for taxable accounts, total loss targets for portfolios, and choose a replacement security for each harvested security. Once the thresholds have been set, iRebal identifies eligible losses in taxable accounts, and shows you the securities that fit the criteria that you have defined.

iRebal on Veo is a technology offering of TD Ameritrade Institutional and is powered by iRebal. iRebal products and services are property of ThinkTech, Inc., an affiliate of TD Ameritrade, Inc.

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Access to real-time market data is conditioned on acceptance of the exchange agreements.

Access to the Veo platform's open access capabilities is provided as a service to financial 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. Brokerage services provided exclusively by TD Ameritrade, Inc.

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