

# THE TD AMERITRADE INSTITUTIONAL TECHNOLOGY ECOSYSTEM

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

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 120 third-party applications.

### Technology at TD Ameritrade

#### Veo

Veo was specifically designed to increase efficiency for RIAs and allow you to:

- View client accounts, real-time balances, positions and histories
- Access comprehensive account profile information
- Move money on demand
- Complete and submit paperwork online, then monitor its status
- Securely deposit checks online
- Self-manage service requests
- Get important alerts
- Upload and process management fees
- Retrieve electronic statements and confirmations

#### iRebal®

##### Sophisticated 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®

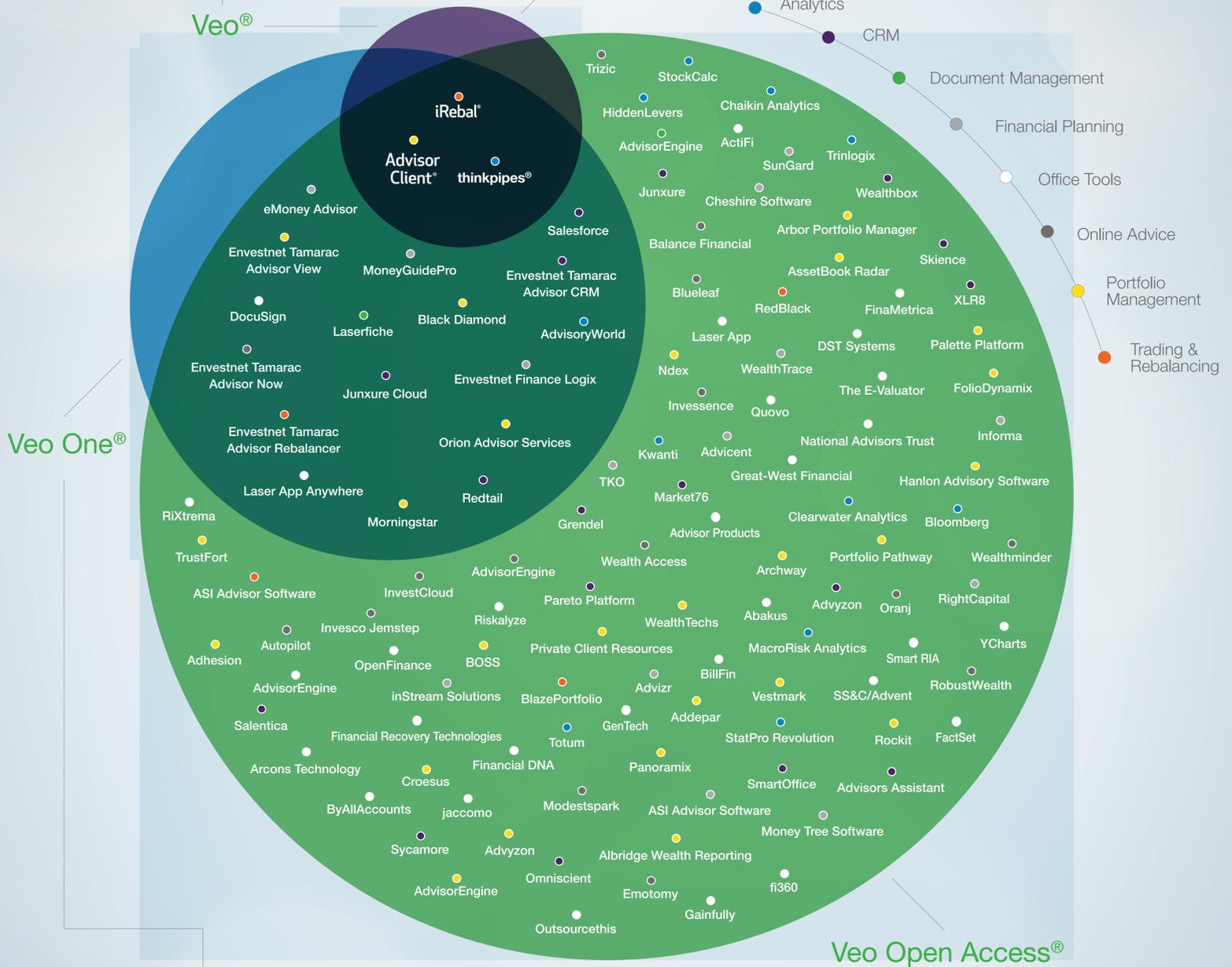
##### Enrich your trading experience with an advanced and intuitive platform.

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

#### Advisor Client®

##### A customizable website 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.



#### Veo One

As the next generation of open architecture, Veo One enables you to bring your Veo 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 Veo functionality, including new account opening and trading capabilities
- Convenient market research center

#### 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 120 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 Veo 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 platform's **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.

Market volatility, volume and system availability may delay account access and trade executions. TD Ameritrade is not responsible for information, opinions or services provided by a third party. TD Ameritrade does not guarantee nor are they responsible for the completeness or accuracy of the data provided or for the quality of any product or service. TD Ameritrade makes no warranty or representation with respect to the service as to suitability or fitness for a particular purpose. In no instance should the listing of a third party be construed as a recommendation or endorsement by TD Ameritrade. Past performance does not guarantee future results.

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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