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## **TD Ameritrade Institutional's Model Market Center Lets RIAs Streamline Investment Management – For Less**

*A marketplace of models lets RIAs research and implement third-party investment strategies for their client portfolios*

**JERSEY CITY, N.J., Jan. 17, 2018** – When it comes to managing client portfolios, some registered investment advisors (RIAs) prefer to do it all themselves, researching and executing trades, while others employ the services of third-party asset managers. Now, TD Ameritrade Institutional<sup>1</sup> has introduced an innovative, new alternative: **Model Market Center**,

This revolutionary platform lets independent RIAs on the TD Ameritrade Institutional platform leverage the brain power of leading money managers right from their desktops, without the constraints and complexity that come with outsourcing solutions.

With Model Market Center, advisors can select from a broad menu of third-party investment models in one, central location. The platform then seamlessly leverages iRebal<sup>®</sup> on Veo<sup>®</sup> -- TD Ameritrade's powerful trading and portfolio management technology -- to execute those models in the manner they choose. As providers update their models, changes are automatically communicated to advisors.

For do-it-yourself advisors, Model Market Center can save the time spent building models from scratch, so they can devote more time working with clients and financial planning, while retaining investment management fiduciary control and responsibility, flexibility, and trading discretion.

And for those that employ traditional third-party platforms, Model Market Center can represent a less-costly alternative. A broad menu of models is available to advisors at no additional fee<sup>2</sup>, and there's no investment minimum for assets held at TD Ameritrade Institutional.

"Investment management isn't just time-consuming, it's increasingly commoditized. Model Market Center lets advisors apply the investment strategies of well-known money managers with a few clicks. So though advisors must still research investment options and monitor models, our new platform can help them focus more on those activities that deliver greater value," said Danielle Fava, director of product strategy and development at TD Ameritrade Institutional. "Advisors are increasingly seeking efficiencies. With this platform, we are delivering what we believe to be a more modern approach."

Model Market Center currently offers access to a selection of models from eight investment managers:

- Anchor Capital Advisors
- CLS Investments
- Cambria Investments
- Goldman Sachs Asset Management
- Russell Investments
- State Street Global Advisors
- Wilshire Associates
- WisdomTree Investments

"And this is only the beginning. Model Market Center is an open-architecture platform and we expect to add more providers and models over time," Fava said.

## Keeping Pace Through Innovation

Many RIAs choose to outsource the work of investment management to third-party asset management platforms, also known as TAMPs, which help advisors by taking over full discretion of investment management and sharing of fiduciary responsibility in exchange for overlay fees.

Model Market Center presents a different approach. After advisors complete their due diligence they can subscribe to investment models and download them directly into iRebal on Veo<sup>®</sup>, the powerful, tax-efficient rebalancing tool available at no additional cost for accounts held with TD Ameritrade Institutional. There, advisors can implement one model or blend multiple models -- including those they build themselves -- based on the unique needs of each client account.

The models currently available are comprised of ETFs and mutual funds, but over time may include individual stocks and other securities. Some models leverage TD Ameritrade's expanded menu of commission-free funds available through the ETF Market Center.

Since Model Market Center was activated on Oct. 30, more than 1,000 independent RIAs utilizing the TD Ameritrade Institutional platform have signed on; many are already putting the Model Market Center to work with their clients' assets. Model Market Center represents yet another way TD Ameritrade Institutional is helping RIAs keep pace with accelerating technology change to optimize their firms.

"One of the top concerns we hear from advisors is they don't have the time to create their own models, and yet SMAs can be expensive. So, we like the Model Market Center concept: it's a good, low-cost alternative, particularly in investment areas where margins are thinner," said Chuck Ballweg, co-owner of Prosperity Financial Group, Inc., an early adopter of Model Market Center. "I'm pleasantly surprised by the lineup of managers in the program: it's very impressive."

### To Learn More

To learn more, TD Ameritrade Institutional clients can visit [The Education Center](#) on Veo<sup>®</sup> or contact their relationship manager. Other advisors are invited to call (800) 934-6124.

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*Model Market Center is an offering of TD Ameritrade, Inc. Registered Investment Advisor (RIA) that leverages iRebal<sup>®</sup> on Veo<sup>®</sup> 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.*

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- 1 TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation
- 2 Standard TD Ameritrade Institutional custody fees and fund management fees apply. In the future, models that require a usage fee may be added to the platform.

**About TD Ameritrade Institutional**

[TD Ameritrade Institutional](#) is a leading provider of comprehensive brokerage and custody services to more than 6,000 fee-based, independent RIAs and their clients. Our advanced technology platform, coupled with personal support from our dedicated service teams, allows investment advisors to run their practices more efficiently and effectively while optimizing time with clients. TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation.

**About TD Ameritrade Holding Corporation**

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**Source: TD Ameritrade Holding Corporation**