



Separately Managed Accounts Made Easy

BEACON POINTE ADVISORS IN NEWPORT

Beach, Calif., carefully sifts through some 20,000 investment managers from around the world using their own in-depth qualitative and quantitative analyses to select best-in-class choices for its high-net-worth clients. The platform Beacon Pointe uses to manage those accounts is TD AMERITRADE Institutional's Separate Account Exchange (SAE). The SAE is a "supermarket" of separately managed account strategies covering every major investment sector, including capitalization segments, styles and asset classes. "For us it was a needs-based decision," says Shannon Eusey, Beacon Pointe Advisors' President and Chief Operating Officer. "And our operations department will tell you that the SAE is their favorite platform to work with."

Hands-on advisors like Eusey who prefer to customize individual client portfolios using

their own managed account programs can select their investment managers and negotiate manager fees and minimums directly with them. Advisors can also choose between asset-based or transaction-based pricing.

Just as important, when Eusey finds managers she wants to use who aren't already on the platform, TD AMERITRADE Institutional will work with those managers to get them on board.

Access to the Separate Account Exchange program is provided solely as a service to financial advisors using the brokerage, execution and custody services of TD AMERITRADE Institutional. Participating investment managers are independent and are not employees or agents of TD AMERITRADE. TD AMERITRADE does not guarantee nor is responsible for the quality or accuracy of any investment manager's product or service. In no instance should the listing of an investment manager be construed as a recommendation or endorsement by TD AMERITRADE. Please contact the investment manager directly for the most recent information pertaining to their investment styles and management fees.

Beacon Pointe Advisors and TD AMERITRADE Institutional are separate, unaffiliated firms and are not responsible for each other's products or services.

A New Offer Targets Savings

TD AMERITRADE INSTITUTIONAL IS

pleased to announce that maintenance fees for Orion Advisor Services and/or IAS Solution 360° software will be waived for new accounts transferred to or opened at TD AMERITRADE Institutional by December 31, 2010.

- The offer is for new and existing clients.
- For new clients only, TD AMERITRADE Institutional will cover up to \$5,000 in conversion costs.
- For Interactive Advisor Software users, the offer applies only if you use or move to IAS Solution 360°.
- Fees will be waived for one full year from when the account is opened or transferred.

Orion Advisor Services provides comprehensive back-office systems, handling tasks such as database reconciliation, performance and cost-basis reporting, statement generation and delivery and fee billing. The Orion platform integrates with key partners to offer integrated customer relationship management (CRM) and financial planning. IAS Solution 360° is a unified wealth management software solution combining portfolio management, financial planning, CRM, back-office services, client access portals and rebalancing. One database on one platform provides efficient data control. To learn more, contact your Service Team.

TD AMERITRADE Institutional, IAS Solution 360°, and Orion Advisor Services are separate, unaffiliated companies and are not responsible for each other's products and services. Access to Affinity Services Program vendors is provided solely as a service to financial advisors using the brokerage, execution and custody services of TD AMERITRADE Institutional. These services are offered at a discount directly through the participating vendors. Participating vendors are independent and are not employees or agents of TD AMERITRADE. TD AMERITRADE does not guarantee nor are they responsible for the quality or accuracy of any vendor's product or service. In no instance should the listing of a vendor be construed as a recommendation or endorsement by TD AMERITRADE. Furthermore, TD AMERITRADE does not recommend or endorse any security described by any vendor.