



Media Advisory

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TD Ameritrade Institutional Puts Advisor Technology Integration on Fast Track; Hosts Techie Get Together

Jersey City, N.J., April 25, 2011 - TD Ameritrade Institutional, a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation (NASDAQ: AMTD), and leading independent software providers converge for a Technology Summit, Apr. 26-27, 2011 in Dallas, Texas. The Summit brings together third-party technology vendors including leading CRM, Portfolio Management and Financial Planning software providers, all working toward a common goal of creating better integration between the systems advisors use to run their businesses.

The Summit is part of a broader effort by TD Ameritrade Institutional to lead an industry wide collaboration to improve the way advisors use technology in their firms. TD Ameritrade Institutional's open architecture approach to technology integration allows multiple software providers to integrate directly with Veo[®], TD Ameritrade's advisor trading platform. Veo's Open Access capabilities can help advisors gain more efficiency by allowing them to choose the technology that meets their business needs, access critical client data all in one place, simplify daily workflows and reduce manual data entry.

"The Veo integration initiative has the power to shape the future of advisor technology," said Jon Patullo, director, technology product management, TD Ameritrade Institutional. "We've taken the time to engage leading tech thinkers and work with them to identify the best approach to tackling the long standing problem of technology integration. Joining forces with these technology leaders, we're able to take technology integration to a new level."

TD Ameritrade Institutional will report on the progress made since the first technology summit, held a year ago. That initial gathering resulted in the creation of a technology integration roadmap for independent vendors looking to integrate their systems with Veo. The upcoming Summit will also offer TD Ameritrade Institutional the opportunity to gain valuable feedback from the software community on best practices for integration and future enhancements, such as mobile applications.

"TD Ameritrade Institutional is taking a unique approach by creating a technology co-op. By sharing our talents and expertise, we're able to push forward faster," said Eric Clarke, president, Orion Advisor Services. "The results of our efforts will benefit our shared advisor clients by improving work flow efficiency and allowing advisors to maximize their technology investments."

TD Ameritrade and Orion Advisor Services are separate, unaffiliated companies and are not responsible for each other's policies and services.

About TD Ameritrade Institutional

TD Ameritrade Institutional¹ is a leading provider of comprehensive brokerage and custody services to over 4,000 fee-based, independent registered investment advisors 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.



About TD Ameritrade Holding Corporation

For more than 36 years, TD Ameritrade Holding Corporation (NASDAQ: AMTD) has been in the business of serving individual investors – either directly or through a network of independent registered investment advisors. Through its brokerage² and education³ subsidiaries, TD Ameritrade combines innovative trading technology, easy-to-use [trading tools](#), investment services and education, and superior client service to create a market-leading financial services experience. Home to *Kiplinger's* #1 online broker,⁴ *Barron's* #1 online broker for "Options Traders",⁵ TD Ameritrade provides millions of retail investors, traders and independent registered investment advisors with the tools, service and support they need to help build confidence in today's rapidly changing market environment. For more information and resources for journalists, please visit the TD Ameritrade [newsroom](#) at www.amtd.com.

¹TD Ameritrade Institutional, Division of TD Ameritrade, Inc., member FINRA/SIPC/NFA.

²TD Ameritrade, Inc., member FINRA (www.FINRA.org) /SIPC (www.SIPC.org) /NFA (www.nfa.futures.org), and TD Ameritrade Clearing, Inc., member FINRA/SIPC.

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⁴TD Ameritrade was ranked #1 and received an overall score of 5 stars (tied for first place with one other broker), in the Kiplinger's Online Broker Ratings, *Kiplinger's Personal Finance*, 02/2011. Fourteen brokers were rated in the categories: Costs, Web site usability, Investment choices, Customer service, and Research and tools.

⁵TD Ameritrade was awarded an overall 4 ½ out of 5 Stars and was named "Best for Option Traders" in *Barron's* 2011 Online Broker Survey, 03/2011. TD Ameritrade also received the highest rating, 4 ½ out of 5 stars, in the "Best for Long-term Investing" category, sharing that rating with only one other broker. TD Ameritrade was evaluated versus 23 other online brokers in eight total categories, including trade experience, trading technology, usability, range of offerings, research amenities, portfolio analysis and reporting, customer service and education and costs. *Barron's* is a registered trademark of Dow Jones & Company © 2006-2011.

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