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**TD AMERITRADE INSTITUTIONAL'S VEO<sup>®</sup> PLATFORM TO ACHIEVE NEW LEVEL OF TECHNOLOGY INTEGRATION FOR ADVISORS**  
***Open architecture "API" aims to streamline advisors' back offices and maximize technology investments***

**Omaha, Neb. Jan. 6, 2011** – TD Ameritrade Institutional, a division of TD Ameritrade, Inc., a subsidiary of TD Ameritrade Holding Corporation (NASDAQ: AMTD) is leading an industry-wide effort to improve the integration of technologies independent registered investment advisors (advisors) use to run their businesses. TD Ameritrade Institutional's open approach to integration will allow disparate systems to "talk" to each other or exchange information, designed to improve advisors' day-to-day operations and maximize their technology investments.

Through TD Ameritrade Institutional's open Application Programming Interface (API), third-party technology providers will be able to integrate common applications advisors use in their back offices such as customer relationship management (CRM), financial planning and portfolio management software with Veo, TD Ameritrade Institutional's comprehensive trading and account management platform. TD Ameritrade Institutional is currently working with leading technology providers to create the open architecture environment for exchanging information between applications. This deep level of integration will allow data to flow seamlessly between Veo and multiple applications, creating efficiencies for advisors and their staff.

"Taking an open approach to technology integration supports our commitment to help advisors run more efficient and profitable practices by allowing them to use the software and tools that meet the unique needs of their firms," said Tom Bradley, president of TD Ameritrade Institutional. "We are excited to lead this industry-changing effort to create a flexible advisor platform that will be able to integrate nearly any technology system available to advisors."

More than a dozen technology providers including industry leading CRM, portfolio management and financial planning software firms have participated in the initial planning and development process, providing feedback on best practices to create an integration methodology. As a result of this collaboration, technology providers now have a roadmap to integrate with Veo and exchange data in a secure and structured manner between applications. Initial integration will include accessing critical data such as client balances, positions, and account alerts across applications. The next level of integration will involve expanding capabilities to include transactional functionality such as trading.

"Open access will allow advisors to exchange data with Veo from various systems, such as their CRM program, and initiate tasks that will automatically pull client data and aggregate information from other platforms ultimately streamlining common processes such as opening new accounts and quarterly reporting," said Jon Patullo, director of technology product management, TD Ameritrade Institutional. "The open approach to integration will serve to speed the rate of innovation throughout the industry as our expanding network of technology vendors looks to provide advisors with more and better productivity and efficiency enhancing tools."



“We’re very excited to be working with TD Ameritrade Institutional on this innovative project and believe it is a giant step in transforming the RIA industry which will bring many operational efficiencies to advisors,” said Eric Clarke, president of Orion Advisor Services, a leading provider of outsourced portfolio management technology to RIAs.

A technology showcase and informational sessions are planned at the **TD Ameritrade Institutional National Conference**, Feb. 2-5 in San Diego, Calif. For more information and to register for the National Conference please visit, <https://www.tdameritradeconferences.com/national/>.

For more information about Veo’s open access capabilities or to learn more about becoming part of the vendor network, please visit [www.tdainstitutional.com/openaccess](http://www.tdainstitutional.com/openaccess).

Access to Veo’s open access capabilities is provided by TD Ameritrade Institutional as a service to financial advisors using the brokerage, execution and custody services of TD Ameritrade Institutional. TD Ameritrade is not responsible for information, opinions or services provided by a third party. TD Ameritrade does not guarantee nor is it responsible for the completeness or accuracy of the data provided or for the quality of any third party product or service. TD Ameritrade makes no warranty or representation with respect to the service as to the 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. TD Ameritrade and Orion Advisor Services are separate, unaffiliated companies and are not responsible for each other’s services and policies.

Veo’s open access capabilities are dependent upon third party vendors first meeting our stringent security requirements and then accessing Veo data from our application programming interface (API). Vendors will be added on an ongoing basis. Since we must ensure that all vendors meet our stringent security requirements, integration with new vendors is not immediate and cannot be guaranteed.

#### **About TD Ameritrade Institutional**

TD Ameritrade Institutional is a leading provider of comprehensive brokerage and custody services to over 4,000 fee-based, independent registered investment advisors and their clients.<sup>1</sup> 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**

TD Ameritrade Holding Corporation, through its brokerage subsidiaries,<sup>2</sup> combines innovative trading technology, easy-to-use and understand investment tools and services, investor education and superior client service to create a market-leading financial services experience. Now home to the award-winning thinkorswim trading technology<sup>3</sup> and the Investools investor education program, TD Ameritrade provides millions of retail investors, traders and independent registered investment advisors (RIAs) with the tools, service and support they need to help build confidence in today’s rapidly changing market environment. The Company’s common stock trades under the ticker symbol AMTD. For more information, please visit [www.amtd.com](http://www.amtd.com).

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

<sup>2</sup> TD Ameritrade, Inc., member FINRA ([www.finra.org](http://www.finra.org))/SIPC ([www.sipc.org](http://www.sipc.org))/NFA ([www.nfa.futures.org](http://www.nfa.futures.org)) and TD Ameritrade Clearing, Inc., member FINRA/SIPC.

<sup>3</sup> thinkorswim, prior to joining TD Ameritrade, earned 4.9 stars, the top score, in the category “Trading Technology,” and was rated #1 overall online broker in *Barron’s* ranking of online brokers, 3/15/2010. thinkorswim was evaluated versus others 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. thinkorswim topped the list in 2006, 2007, 2009 and 2010 with the highest weighted-average score. *Barron’s* is a registered trademark of Dow Jones & Company © 2006-2010.

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