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TD Ameritrade Institutional Veo® Integration with Salesforce CRM Helps Financial Advisors Manage Important Client Relationships

Cloud-based CRM application customized for advisors' unique business needs

Jersey City, N.J. – October 27, 2011 – TD Ameritrade Institutional[1] today introduced a Veo advisor platform integration with Salesforce CRM and other third party systems. The customized CRM app offers advisors flexibility, automated workflows and easier access to client data to help improve efficiency and client service.

The Salesforce integration includes more than 50 automated workflows designed to streamline everyday tasks including new account opening, client onboarding and data management functions. These standard workflows can be customized to accommodate a firm's existing processes and future growth. Account and client data flow seamlessly between Veo and Salesforce, to help advisors save time and give them a comprehensive view of their client relationships. Advisors using the app can also leverage integrations with more than 20 third-party technology providers including leading financial planning, document management and portfolio management systems.

"Product innovation and industry leadership make this an attractive CRM solution for advisors looking to move to cloud-based data management. The new application runs in the cloud, so advisors can access their client data through the web anytime, anywhere and from any device," said Zohar Swaine, managing director, strategy and product development, TD Ameritrade Institutional. "We continue to lead an industry-wide effort with Veo Open Access to improve the integration of technologies that advisors rely upon to run their businesses, and are excited to provide advisors with a robust solution leveraging the power of Salesforce."

TD Ameritrade Institutional's app was developed in collaboration with AppCrown, a firm specializing in Salesforce-based technology integrations for advisors. "TD Ameritrade Institutional has built a bridge between leading CRM and custodial platforms, reaching a new level of technology integration," said Ted Tsung, president, AppCrown, LLC. "Advisors will have consolidated access to their client information, including data from multiple custodian accounts, and in some cases, eliminating the need to jump between separate applications with different logins and passwords. The ability to customize advanced workflows and integrations with portfolio management systems makes this app a real breakthrough for advisors."

The new app for Veo was built on Force.com, Salesforce.com's social enterprise platform for employee-facing apps. It was developed leveraging TD Ameritrade Institutional's open API (application programming interface) which allows different software systems to "talk" to each other. Salesforce is one of several leading advisor CRM technology providers developing integrations with Veo using the open API. Ebix and Redtail will also provide advisors with similar integrated solutions for managing client data.

"This new app for Veo will allow us to spend less time maintaining our customized PC-based CRM system and more time servicing our clients," said Ray Mignone, CFP®, independent registered investment advisor. “The integration of automatic client data feeds from Veo coupled with the highly advanced client touch analytics of the app, will ensure that we are always taking care of our clients. I believe the Veo app will allow us to take client service to the next level, to help give the firm a competitive edge.”

To get started, advisors can contact TD Ameritrade Institutional at 1-800-934-6124 or email, institutionalsales@tdameritrade.com.

For more information about Veo’s open access capabilities, please visit www.tdainstitutional.com/openaccess.

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. 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
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