

AMT announcement to member firms of Ndex availability off of AMT/VEO at May 2013

The screenshot shows the TD Ameritrade Institutional website interface. At the top, there is a navigation bar with links for Home, Site Map, Help, Message Center, Contact Us, and VEO Express. A search bar for quotes and a log off button are also present. Below the navigation bar, there are tabs for Trading, Accounts, Account Tools, Research, Resource Center, and Preferences. A search bar for accounts is visible, along with a 'Go' button and links for 'Show all accounts' and 'Recent accounts'. A personalized greeting for Marcel Tsai is displayed, indicating the last successful log on was on April 18, 2013.

The main content area is divided into several sections:

- Today's Alerts:** A section indicating that the user currently has no alerts, with a link to 'Go to Alert Center'.
- Market Summary:** A section featuring a line chart for the Dow Jones Industrial Average. The chart shows the closing price for Tuesday at 15,409.39. Below the chart is a table of market data:

Index	Value	Change	% Change
DJIA	15,272.9	-136.4	(-0.9%)
Nasdaq	3,464.6	-24.2	(-0.7%)
S&P500	1,648.2	-13.9	(-0.8%)
10 Year Note	2.1	0.0	(-0.9%)

Market Update: A text block providing a 12:30 pm ET update on market performance, noting that major averages are down and the tech-heavy index is also down.

Latest Announcements: A list of recent news items, including 'Now Integrated with Veo®: Advisors Assistant®', 'Webcast Archive Now Available: "Develop Your Talent and Build Firm Value"', and 'TD Ameritrade Supports Spring Storms Disaster Relief'.

Did You Know?: A section highlighting new features and information, such as 'Did you know Required Minimum Distribution Information is now available on Veo®?' and 'Veo Forms Wizard Integrated with Laser App Software'.

At the bottom of the page, there is a 'Get quote(s)' search bar with a 'Go' button and a 'Chain' button for options. A 'Quote disclaimer' link is also visible.

TD Ameritrade Institutional

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Get Quote(s) Symbol lookup
ex. MSFT, IBM... Go Chain Log Off

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Account Go Show all accounts Recent accounts Tell us what you think

Now Integrated with Veo®: Ndex

An integrated technology solution can be crucial to running your business smoothly and efficiently. To help you get more from the third-party technology applications you already use, we continue expanding our list of applications that are integrated with Veo®. TD Ameritrade's custodial technology platform had the most "very satisfied" advisors in 2012, according to the Financial Planning Tech Survey.¹

The Latest Integration

The Ndex platform, which combines portfolio management and CRM capabilities, is now integrated with Veo. Within Ndex you can now:

- Access critical Veo client data such as:
 - Account information
 - Balances
 - Positions
 - Transaction history
- Make transactions directly from the platform and get real-time order statuses and executions
- Automatically rebalance clients' portfolios based on investment models and objectives

About Ndex Systems Inc.

Ndex Systems Inc. is a private, Montreal based software company in business since 1999, and is devoted to the development of portfolio management software. The fully integrated and reconciled platform is designed to facilitate the daily workflow of client management while enabling internal compliance and reporting. Ndex products are used by a growing number of domestic and international financial institutions.

To learn more about the key features of Ndex, visit <http://www.ndexsystems.com/14/features>. To arrange a demo, please contact the Ndex sales team at 514-288-0908 ext. 202.

The Veo Platform's Open Access Capabilities Continue to Grow

Our growing open access third-party provider network is a reflection of your feedback. We will continue to listen to your needs and integrate with third-party technology providers to bring efficiencies to your business operations.² To learn more, visit www.tdainstitutional.com/openaccess or call Technology Services at 800-431-3500, option 3. Stay tuned for future announcements.

Get Started

To activate your Veo client data in Ndex:

- Complete the Release of Information form and fax it to 858-678-2855 or email it to techservices@tdameritrade.com
- Notify TD Ameritrade Institutional and Ndex Systems via phone or email:
 - Technology Services at 800-431-3500, option 3, or techservices@tdameritrade.com
 - Ndex Systems at 514-288-0908 ext. 202 or info@ndexsystems.com.

Get quote(s) Go Chain For options, enter the underlying symbol, then click Chain | Symbol lookup

Quote disclaimer