



## **MEDIA ADVISORY**

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## **SELECT PORTFOLIO SOLUTIONS PROGRAM LAUNCHED**

### **TD AMERITRADE Institutional and FundQuest bring refined managed accounts solution to RIAs**

**Jersey City, NJ, March 7, 2008** – (Nasdaq: AMTD) TD AMERITRADE Institutional is proud to announce a new managed accounts platform created in conjunction with FundQuest. The platform, called Select Portfolio Solutions, provides independent registered investment advisors (RIAs) with comprehensive capabilities to deliver investment advice and better service to their clients.

The Select Portfolio Solutions platform enables advisors to construct client-specific recommendations for individual investors through a breadth of non-proprietary investment choices offered by FundQuest. Specific product options include Unified Managed Accounts (UMAs), Separately Managed Account (SMA) models, Mutual Fund models and others.

“We are constantly looking to add more sophisticated, innovative and flexible options for our advisors,” said Tom Bradley, president, TD AMERITRADE Institutional. “These capabilities enable advisors to spend less time on research and administrative tasks and more time meeting with clients.”

According to David Root, vice-president of institutional sales at FundQuest, “The new platform delivers a broad selection of managed account options combined with back-office operational support and investment due diligence services that can help RIAs accelerate the growth of their business.”

The Select Portfolio Solutions program is currently available to TD AMERITRADE Institutional’s RIA clients. To learn more about the program and TD AMERITRADE Institutional, please visit [www.tdainstitutional.com](http://www.tdainstitutional.com).

### **About TD AMERITRADE Institutional**

TD AMERITRADE Institutional is a leading provider of comprehensive brokerage and custody services to more than 4,000 fee-based, independent Registered Investment



Advisors (RIAs) 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> provides a dynamic balance of investment products and services that make it the investment firm of choice for millions of retail investor and independent registered investment advisor (RIA) clients. Listed by *Barron's* as the #1 Web browser-based online broker and *Forbes* as one of America's best big companies, the Company offers a full spectrum of investment services, including a leading active trader program, intuitive long-term investment solutions and a national branch system, as well as relationships with one of the largest independent RIA networks.<sup>3</sup> The Company's common stock trades under the ticker symbol AMTD. For more information, please visit [www.amtd.com](http://www.amtd.com).

### **About FundQuest**

FundQuest is the best partner to help financial institutions and their financial advisors to grow their business. Services are delivered via partnerships with over 110 financial institutions. The combined US and European operations of FundQuest have \$43 billion in assets under management and administration. Financial institutions leverage FundQuest's flexible menu of wealth management solutions to provide: retirement income management, unified managed accounts, mutual fund advisory, separately managed accounts, trust services, annuities, exchange-traded funds, and alternative investments.

FundQuest is the most innovative and flexible partner with the best overall support for advisors and management. The company's open architecture investments, objective investment management services, and sales and operational support services help financial advisors to address their clients' important financial goals. Services are offered in the US through FundQuest Incorporated, a Registered Investment Advisor founded in 1993. FundQuest is owned by BNP Paribas, a global leader in banking and financial services. For more information please visit [www.fundquest.com/usa](http://www.fundquest.com/usa)

<sup>1</sup>TD AMERITRADE Institutional, Division of TD AMERITRADE, Inc., member FINRA ([www.finra.org](http://www.finra.org)) / SIPC ([www.SIPC.org](http://www.SIPC.org)).

<sup>2</sup>TD AMERITRADE, Inc., member FINRA ([www.finra.org](http://www.finra.org)) /SIPC ([www.SIPC.org](http://www.SIPC.org)), receives clearing and custodial services from TD AMERITRADE Clearing, Inc., member FINRA/SIPC. TD AMERITRADE and TD AMERITRADE Clearing, Inc. are subsidiaries of TD AMERITRADE Holding Corporation.

<sup>3</sup>"The Best Web Browser-Based Online Broker" by Barron's, 3/5/2007 based on Trade Experience, Trading Technology, Usability, Range of Offerings, Research Amenities, Portfolio Analysis & Reports, Customer Service & Access, and Costs. Barron's is a registered trademark of Dow Jones, L.P. More info on the Forbes award is available at [www.forbes.com/platinum](http://www.forbes.com/platinum).