

High Net Worth Insight, Powered by Infinata

Gain greater insight into new clients and prospects.

What is High Net Worth Insight?

This extensive online database from Infinata is a powerful prospecting tool that gives you access to public information on more than 2.5 million high-net-worth investors, 100,000 foundations and endowments, and 1 million retirement plan contacts. And it is available to advisors through TD AMERITRADE Institutional at no additional cost—all to help you grow your business.

Review wealth-creating public information.

With High Net Worth Insight, you can follow recent job appointments and mergers and acquisitions for the database's high-net-worth individuals, the companies they work for and the retirement plans for those companies.

Customize your search for prospects.

Identify key prospects based on criteria such as:

- HNW Wealth Indicator Score
- Job function
- Industry
- Size of company
- Assets in the retirement plan

Get email alerts from Infinata to help you learn how to:

- Cross-sell your services
- Find referral opportunities
- Identify the competition
- Target local 401(k) plans
- Plan niche marketing campaigns and more

OVERVIEW:

Experience powerful information and customized business leads at your fingertips.

- Track the daily movement of your prospects' money.
- Gain insight into a deep pool of high-net-worth prospects, including:
 - More than 2.5 million high net worth investors
 - More than 100,000 foundations and endowments
 - More than 1 million retirement plan contracts
- Conduct searches to hone in on your target prospects.
- Register for email alerts from Infinata to receive customized leads and more—all based on criteria you define.

TD AMERITRADE
Institutional

Committed To Your Success.

High Net Worth Insight, Powered by Infinata

To get started:

1. Log on to Veo®.
2. Select the **Account Tools** tab.
3. Select **Infinata**.

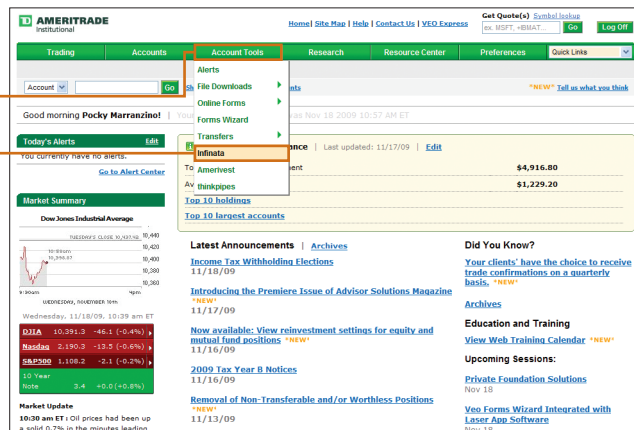
You will be taken to a page outside the TD AMERITRADE Institutional site to register. Each time thereafter, you will need to log on to use the database.

To learn more about High Net Worth Insight:

Visit the Web Training Calendar on the Veo home page for information about upcoming High Net Worth Insight Web demonstrations.

For help using High Net Worth Insight, call Product Support at 800-522-5944.

Log on to Veo and sign up for High Net Worth Insight today.



The screenshot shows the TD AMERITRADE Institutional website interface. The 'Account Tools' menu is open, and 'Infinata' is highlighted. The page also displays market data, including the Dow Jones Industrial Average, and various news items and announcements.

For illustrative purposes only.

Connect with an Experienced Consultant Today.

CALL 800-934-6124

VISIT tdainstitutional.com

TD AMERITRADE
Institutional

Committed To Your Success.

In collaboration with:

High Net Worth Insight
Uncovering Wealth for Your Prospecting Needs

TD AMERITRADE and Infinata are separate, unaffiliated companies and are not responsible for each other's services and policies. Access to the Infinata database 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 does not guarantee nor is it responsible for the completeness or accuracy of the data provided by third-party firms or for the quality of any third-party firm's product or service.

Brokerage services provided by TD AMERITRADE Institutional, Division of TD AMERITRADE, Inc., member FINRA/SIPC. TD AMERITRADE is a trademark jointly owned by TD AMERITRADE IP Company, Inc. and The Toronto-Dominion Bank. © 2010 TD AMERITRADE IP Company, Inc. All rights reserved. Used with permission.

TDAI 7766 SS 02/10