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TD Ameritrade Institutional's Advisors Private Wealth Trust Receives 2016 Wealth Management Industry Award

Advisors Private Wealth Trust, a Strategic Alliance Formed with National Advisors Trust Company in 2015, Established Relationships with More Than 300 RIA Firms in its First Year

JERSEY CITY, N.J., Nov. 2, 2016 -- TD Ameritrade Institutional's¹ Advisors Private Wealth Trust, a program that provides trustee services to independent registered investment advisors ("RIAs"), was named a winner of the Wealth Management 2016 Industry Awards in the Trusts category by *Wealth Management* magazine.

Wealth Management is a leading news and information source for financial advisors. The annual awards program honors outstanding achievement by companies and organizations that support financial advisors. Advisors Private Wealth Trust was named the best new [trusts platform](#) among nominees from across the financial services industry.

"Providing trustee services helps RIAs meet the needs of investors looking to preserve their family's wealth for future generations. With [Advisors Private Wealth Trust](#), we give RIAs a better way to capture these opportunities, provide a better experience for clients and reduce the risk that trust assets will move on to another provider when the generational transfer takes place," said Jim Dario, managing director of product management and services at TD Ameritrade Institutional. "Our program lets RIAs provide independent, impartial oversight from a committed, dedicated trustee for their clients' trusts."

TD Ameritrade created the Advisors Private Wealth Trust program with National Advisors Trust Company, FSB, an independent company founded by RIAs to help other RIAs offer trust services in all 50 states and which does not compete with RIAs as investment managers. The program features a Dedicated Trust Consultant to assist advisors and employs a directed trust model, which gives advisors fiduciary responsibility over a trust's investments.

The program also is fully integrated with TD Ameritrade's back office, which manages disbursements on behalf of RIAs and their clients. TD Ameritrade announced its strategic alliance with National Advisors Trust in January 2015. In its first year, Advisors Private Wealth Trust formed relationships with more than 300 RIA firms.

"As Baby Boomers age, demand for trust services will only increase, particularly among high net worth investors," said Jim Combs, president and chief executive of National Advisors Trust Company. "With Advisors Private Wealth Trust, RIAs can grow their businesses and gain a share of the wealth set to be transferred between generations. Advisors Private Wealth Trust helps advisors build stronger relationships with the next generation and puts them in a better position to keep the assets they already manage."

Building relationships with the next generation of clients is a key factor in the sustainability of RIA firms: 66 percent of heirs fire their parents' advisor after they inherit their parents' wealth, according to a recent industry study.² Offering trust services can also help attract new clients: an estimated 78 percent of investors with more than \$1 million in net worth use trust services.³

To Learn More

The Advisors Private Wealth Trust program is available exclusively to RIAs working with TD Ameritrade Institutional. For more information, call (844) 326-1515 or send email to APWTsupport@tdameritrade.com.

Advisors Private Wealth Trust is a Trust Representative Office of National Advisors Trust Company, FSB (NATC).

¹ TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation.

² "The Great Wealth Transfer is Coming, Putting Advisers at Risk," *Investment News*, July 13, 2015

³ SEI Investment Management, 2014.

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About TD Ameritrade Institutional

TD Ameritrade Institutional is a leading provider of comprehensive brokerage and custody services to 5,000 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. TD Ameritrade Institutional is a division of TD Ameritrade, Inc., a brokerage subsidiary of TD Ameritrade Holding Corporation.

About TD Ameritrade Holding Corporation

Millions of investors and independent registered investment advisors turn to TD Ameritrade's (**Nasdaq: AMTD**) technology, people and education resources to help make investing and trading easier. Online or over the phone. In a branch or with an independent RIA. First-timer or sophisticated trader. Our clients want to take control, and we help them decide how - bringing Wall Street to Main Street for 40 years. An official sponsor of the 2016 U.S. Olympic and Paralympic Teams, as well as an official sponsor of the National Football League, TD Ameritrade has time and again been recognized as a leader in investment services. Visit TD Ameritrade's newsroom or amtd.com for more information.

Brokerage services provided by TD Ameritrade, Inc., member FINRA / SIPC

About National Advisors Trust Company

National Advisors Trust Company, FSB, is a premier, independent national trust company providing expert trust services and solutions to trusted advisors and the families they serve. NATC is an operating entity of National Advisors' family of companies which also includes: National Advisors Trust of South Dakota, Inc.; National Advisors Concierge Services; and National Advisors Holdings, Inc. *Enriching lifelong relationships* unites and unifies the professional staff of National Advisors. We embrace our clients with this common purpose, delivering a seamless, consistent experience across our family of companies.

TD Ameritrade, NATC, and *Wealth Management* magazine are separate and unaffiliated companies and are not responsible for each other's policies and services.

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Source: TD Ameritrade Holding Corporation