



Fi360 Toolkit and Veo Integration User Guide

Information about how to get started
using the integration between the
fi360 Toolkit and Veo Platform

I use the Veo platform, what will this integration allow me to do?

The integration simplifies the client creation process allowing you to quickly start using the Client Cabinet functionality to generate reports, investment policy statements and more

- Easily create clients to use in the Toolkit
 - Automatically create client basic information in the Client Cabinet
 - Automatically populate your clients' holdings and dollar values
- Automatically update investment dollar values on a daily basis for each client

How do I get started using this integration?

- **NEW TOOLKIT USERS:** To gain access to the fi360 Toolkit, please request a free, 30 day trial then follow the steps in the rest of this document: <http://www.fi360.com/products-services/tools-overview/toolkit-for-advisors/free-trial>
- **EXISTING TOOLKIT USERS:** If you are already a Toolkit user, please login and follow the instructions in the rest of this document to utilize the Veo integration

Access www.fi360.com in your web browser and select **LOGIN**

The screenshot shows the fi360 website homepage. The top navigation bar is dark blue and contains the fi360 logo on the left, followed by links for HOME, CONTACT, NEWS, CAREERS, DESIGNEE SEARCH, FIDUCIARY STORE, and BLOG. A search bar is located to the right of these links, and the LOGIN button is circled in red. Below the navigation bar, there are several menu items: ABOUT fi360, PRODUCTS & SERVICES, FIDUCIARY RESOURCE CENTER, PRUDENT INVESTMENT PROCESS, CENTER FOR FIDUCIARY STUDIES, fi360 CONFERENCE, and EVENTS CALENDAR. The main content area features a large green graphic with the text: "THE fi360 TOOLKIT FOR ADVISORS is online software for managing and documenting a prudent investment process. It contains ANALYTICAL, REPORTING, AND MANAGEMENT FEATURES for both fiduciary and non-fiduciary investment professionals." Below this text are two buttons: "FREE TRIAL" and "ABOUT fi360". The bottom section of the page is divided into three columns. The left column contains four buttons: "fi360 LOGIN", "EVENTS CALENDAR", "FREE TRIAL", and "INSIGHTS 2014". The middle column is titled "fi360 NEWS" and contains three news items with dates and "READ MORE" links. The right column is titled "FROM OUR BLOG" and contains five blog entries with dates and "READ" links.

fi360
prudent
fiduciary insight

HOME CONTACT NEWS CAREERS DESIGNEE SEARCH FIDUCIARY STORE BLOG Search LOGIN

ABOUT fi360 PRODUCTS & SERVICES FIDUCIARY RESOURCE CENTER PRUDENT INVESTMENT PROCESS CENTER FOR FIDUCIARY STUDIES fi360 CONFERENCE EVENTS CALENDAR

THE fi360 TOOLKIT FOR ADVISORS is *online software for managing and documenting a prudent investment process. It contains ANALYTICAL, REPORTING, AND MANAGEMENT FEATURES for both fiduciary and non-fiduciary investment professionals.*

Register for a [FREE TRIAL](#) or learn more [ABOUT fi360](#)

fi360 LOGIN

EVENTS CALENDAR

FREE TRIAL

INSIGHTS 2014

fi360 NEWS

December 16, 2013
Integration of technologies will support enhanced advisor-client communications and more successful client and investment management practices. [READ MORE](#)

November 01, 2013
Ann Schleck & Co., a division of fi360, just released the updated version of their Fee Benchmark™ Adviser Fee Almanac. [READ MORE](#)

October 17, 2013
We are pleased to announce that we have acquired IPS AdvisorPro, the cloud-based technology for building and maintaining investment policy statements. [READ MORE](#)

September 24, 2013
We are pleased to announce that Ann Schleck & Co., the business development solutions provider, has joined the fi360 team. [READ MORE](#)

FROM OUR BLOG

December 16, 2013
Fiduciary Links: Florida Court Rejects SEC Position on Broker's "Solely Incidental" Investment Advice Based on Lunar Cycles [READ](#)

December 09, 2013
Fiduciary Links: When great minds speak [READ](#)

December 04, 2013
How does one demonstrate that a service provider arrangement is reasonable? [READ](#)

December 02, 2013
Fiduciary Links: What's the value of a retirement income projection? [READ](#)

November 26, 2013
Fiduciary Links: Comments Shed Light on Future SEC Action [READ](#)

November 21, 2013
Practice 1.2: Follow governing documents [READ](#)

Enter email address and password to sign in

The image shows a screenshot of the fi360 website with a modal window titled "fi360 LOGIN" open. The modal has an orange header with the text "fi360 LOGIN" and a "CLOSE" button with an 'x' icon. Below the header, there are two tabs: "TRAINING" and "MY fi360". The "TRAINING" tab is selected and contains a "LOGIN →" button and the text "TO THE ONLINE TRAINING". The "MY fi360" tab is also selected and contains the text "fi360 TOOLKIT & DESIGNEE PORTAL". Below this text are two input fields: "E-mail / Username" with the value "travis.reed@fi360.com" and "Password (Case-sensitive)" with a masked password "*****". A "LOGIN →" button is highlighted with a red circle below the password field. Below the login fields are two links: "Need help logging in?" and "Forgot your password?". At the bottom of the modal, there is a "WEBSITE ANNOUNCEMENTS" section with a red exclamation mark icon. The announcement text reads: "My fi360 Service Notice: The AIF/AIFA Designee Portal and fi360 Toolkit will be unavailable from 9:00 p.m. until 11:59 p.m. ET on Thursday, December 19, 2013 as we perform system maintenance." The background of the website is dimmed, showing navigation links like "ABOUT fi360", "PRODUCTS & SERVICES", "FIDUCIARY RESOURCE CENTER", "PRUDENT INVESTMENT PROCESS", "CENTER FOR FIDUCIARY STUDIES", "fi360 CONFERENCE", and "EVENTS CALENDAR".

Select My Clients(or any Quick Link) to access the Toolkit

The screenshot displays the fi360 user interface. At the top left, the fi360 logo is shown next to the date 'DECEMBER 18, 2013'. On the top right, a user is logged in as 'Travis Reeder' with a 'Logout' link. Below the header, a navigation bar includes 'My fi360 Home', 'Account Profile', and 'Account Merge'. The main content area is titled 'Welcome to My fi360!!' and contains a message: 'My fi360 is a brand new consolidated access point to view all of your fi360 subscriptions.' There are two main panels: 'Fi360 Toolkit for Advisors' and 'Designee Portal'. The 'Fi360 Toolkit for Advisors' panel shows 'Subscription Information' with a level of 'Platinum' and a list of 'Quick Links' including 'My Clients', 'Investment Analyzer', 'My Proposals', and 'My Models'. The 'My Clients' link is circled in red. The 'Designee Portal' panel shows a 'Renewal Date' of '2014-11-22' and a 'Quick Links' section with a 'Go to Designee Portal!' link. On the right side, there is a promotional banner for 'INSIGHTS 2014' with the dates 'APRIL 24-26' and a 'REGISTER NOW!' button.

fi360 DECEMBER 18, 2013 Welcome Travis Reeder! | Logout

Welcome Travis Reeder!

My fi360 Home Account Profile Account Merge

TOOLKIT SUPPORT: 866-390-5080 EXT. 403 OR EMAIL: TOOLS@FI360.COM
DESIGNEE PORTAL SUPPORT: 866-390-5080 EXT. 404 OR EMAIL: DESIGNATIONS@FI360.COM

Welcome to My fi360!!
My fi360 is a brand new consolidated access point to view all of your fi360 subscriptions.

Fi360 Toolkit for Advisors

Subscription Information

Subscription Level: Platinum

Quick Links:

- [My Clients](#)
- [Investment Analyzer](#)
- [My Proposals](#)
- [My Models](#)

Designee Portal

Renewal Date: 2014-11-22

Quick Links: [Go to Designee Portal!](#)

INSIGHTS 2014
Fostering A Higher Standard of Fiduciary Excellence
APRIL 24-26
REGISTER NOW!

Select Integration Partners: Settings>User Settings>Integration Partners

The screenshot shows a web application interface with a navigation bar at the top. The navigation bar includes the following items: My F360, Tools Home, My Clients, My Proposals, My Lists, My Models, Individual Tools, Settings, and Help Center. The 'Settings' menu is expanded, showing a list of options: User Settings, Expense Settings, Report Settings, Benchmarks, Watch List Mgmt, Global Reporting, Asset Class Mapping, and Notes. The 'Integration Partners' option is highlighted in orange. Below the navigation bar, there is a search bar and a filter section. The filter section includes a dropdown for 'Client Type' (set to 'All') and a dropdown for 'Most recent data period' (set to 'All'). On the right side, there is a section titled 'I want to...' with two buttons: 'Create a new client' and 'Delete client(s)'. The 'Create a new client' button has a green 'Create' button below it. The 'Delete client(s)' button has a trash icon and a 'Delete selected' link below it.

My F360 Tools Home My Clients My Proposals My Lists My Models Individual Tools Settings Help Center

User Settings > Custom Holdings Directory
Expense Settings > Due Diligence Criteria
Report Settings > Integration Partners
Benchmarks >
Watch List Mgmt >
Global Reporting >
Asset Class Mapping >
Notes >

ve an existing client file. Use the filters to refine the client list or the search to quickly find a specific client file.

Client Type: All
Most recent data period: All

I want to...

Create a new client
Create

Delete client(s)
Delete selected
(Use checkboxes on left)

Select Integration Partners: Settings>User Settings>Integration Partners

The screenshot shows a web application interface with a navigation bar at the top. The navigation bar includes the following items: My F360, Tools Home, My Clients, My Proposals, My Lists, My Models, Individual Tools, Settings, and Help Center. The 'Settings' menu is expanded, showing a list of options: User Settings, Expense Settings, Report Settings, Benchmarks, Watch List Mgmt, Global Reporting, Asset Class Mapping, and Notes. The 'Integration Partners' option is highlighted in orange. Below the navigation bar, there is a search bar and a text prompt: 've an existing client file. Use the filters to refine the client list or the search to quickly find a specific client file.' On the right side, there is a section titled 'I want to...' with two buttons: 'Create a new client' and 'Delete client(s)'. The 'Create a new client' button has a green 'Create' button below it. The 'Delete client(s)' button has a trash icon and the text 'Delete selected (Use checkboxes on left)'. At the bottom left, there are two dropdown menus: 'Client Type:' with 'All' selected and 'Most recent data period:' with 'All' selected.

Add integration partner

The screenshot shows the 'Integration Partners' page in the fi360 application. The page header includes the fi360 logo, the date 'JANUARY 20, 2014', and a navigation menu with items like 'My F360', 'Tools Home', 'My Clients', 'My Proposals', 'My Lists', 'My Models', 'Individual Tools', 'Settings', and 'Help Center'. Below the header, there are tabs for 'Custom Holdings Directory', 'Due Diligence Criteria', and 'Integration Partners'. A green 'Report Queue' button is located in the top right corner. The main content area is titled 'Integration Partners' with a 'Hide help text [-]' link. A message states: 'Your active or pending integration partners are listed below. Add a new partner to your Toolkit account by clicking on the Add button in the I want to... column.' Below this is a table with columns for 'Partner Name', 'Account ID', 'Status', and 'Date Added'. The table is currently empty, with the text 'No integration partners exist. Click the Add button on the right to add a new partner.' A red circle highlights the 'Add' button in the 'I want to...' column. To the right of the table, there are three sections: 'Add Integration partner' with an 'Add' button, 'Delete integration partner(s)' with a 'Delete selected' button and a note '(Use checkboxes on left)', and 'Get help' with two links: '? How long will it take to approve the integration partner?' and '? What if I don't see an integration partner I want to link to my account?'.

fi360 JANUARY 20, 2014

My F360 Tools Home My Clients My Proposals My Lists My Models Individual Tools Settings Help Center

Integration Partners Report Queue

Custom Holdings Directory Due Diligence Criteria Integration Partners

Integration Partners Hide help text [-]

Your active or pending integration partners are listed below. Add a new partner to your Toolkit account by clicking on the Add button in the I want to... column.

Exit

Partner Name	Account ID	Status	Date Added	I want to...
No integration partners exist. Click the Add button on the right to add a new partner.				Add Integration partner Add

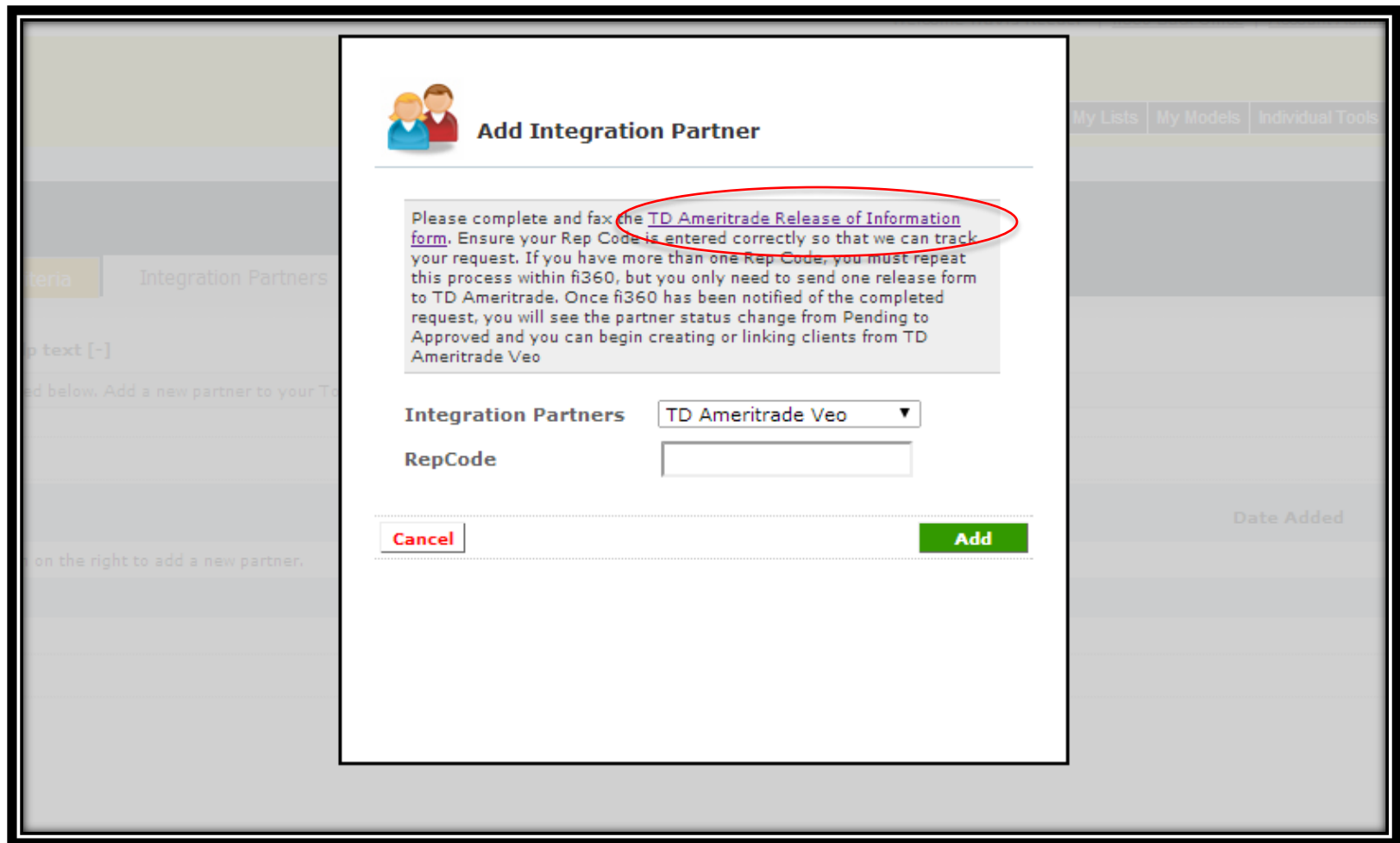
Exit


Delete integration partner(s)
Delete selected
(Use checkboxes on left)

Get help

- ? [How long will it take to approve the integration partner?](#)
- ? [What if I don't see an integration partner I want to link to my account?](#)

Select link to Release of Information form



 **Add Integration Partner**

Please complete and fax the [TD Ameritrade Release of Information form](#). Ensure your Rep Code is entered correctly so that we can track your request. If you have more than one Rep Code, you must repeat this process within fi360, but you only need to send one release form to TD Ameritrade. Once fi360 has been notified of the completed request, you will see the partner status change from Pending to Approved and you can begin creating or linking clients from TD Ameritrade Veo

Integration Partners

RepCode

Complete and send ROI form to TD Ameritrade Institutional



Reset Form

RELEASE OF INFORMATION

TD Ameritrade Institutional, a division of TD Ameritrade, Inc. (collectively, "TD Ameritrade") has entered into an alliance with fi360, Inc. (together with its affiliates, "Servicer").

The alliance is intended as a value-added service to independent investment advisors ("Advisors") who custody customer assets at TD Ameritrade and who use Servicer as a service provider.

In connection with the services provided by Servicer, you may direct that information related to the accounts custodied at TD Ameritrade and/or other Confidential Information be provided by TD Ameritrade to Servicer. "Confidential Information" herein is deemed to include confidential client, business, financial or technical information or data proprietary to you that is competitively and commercially valuable to you and not generally known, or available by legal means, to third parties. Servicer in turn may use the Confidential Information to enable you to access client information as part of the services it provides to you. TD Ameritrade and Servicer have entered into a Confidentiality Agreement in connection with the services provided that protects the confidentiality of TD Ameritrade confidential information.

Your signature below will acknowledge your agreement to the release by TD Ameritrade of Confidential Information to Servicer relating to your Advisor customers. You further hereby represent that you have obtained from your Advisor customers all authorizations necessary for release of this information in a manner consistent with applicable privacy laws and regulations. You agree to indemnify and hold harmless TD Ameritrade from and against any and all claims arising in connection with this agreement and TD Ameritrade reliance thereon.

Please indicate your agreement to the foregoing by signing and returning a copy of this agreement to TD Ameritrade Technology Services at fax # 858-678-2855.

Select Integration Partner, enter RepCode, select Add



 **Add Integration Partner**

Please complete and fax the [TD Ameritrade Release of Information form](#). Ensure your Rep Code is entered correctly so that we can track your request. If you have more than one Rep Code, you must repeat this process within fi360, but you only need to send one release form to TD Ameritrade. Once fi360 has been notified of the completed request, you will see the partner status change from Pending to Approved and you can begin creating or linking clients from TD Ameritrade Veo

Integration Partners

RepCode

1. Advisor enters Rep Code they intend to use.
2. Advisor completes ROI and sends it to TD Ameritrade.

After the status is changed to “Approved”, you will be able to use the integration features

The screenshot shows the 'Integration Partners' interface. At the top, there are navigation tabs: 'Custom Holdings Directory', 'Due Diligence Criteria', and 'Integration Partners'. A 'Report Queue' button is in the top right. Below the tabs, the page title is 'Integration Partners' with a 'Hide help text [-]' link. A message states: 'Your active or pending integration partners are listed below. Add a new partner to your Toolkit account by clicking on the Add button in the I want to... column.'

There is an 'Exit' button on the left. The main table has the following data:

Partner Name	Account ID	Status	Date Added
<input type="checkbox"/> TD Ameritrade Veo	9876XXX	Approved	01/27/2014
<input type="checkbox"/> TD Ameritrade Veo	8876XXX	Approved	01/27/2014
<input type="checkbox"/> TD Ameritrade Veo	7876XXX	Approved	01/27/2014
<input type="checkbox"/> TD Ameritrade Veo	xx3	Pending	04/17/2014

The 'Pending' status in the last row is highlighted with a red box, and a red arrow points to it from below. Below the table, another 'Exit' button is on the left, and a red text note says: 'Link placed in pending status until TD Ameritrade notifies fi360.'

On the right side, there are three sections: 'I want to...' with an 'Add integration partner' button and an 'Add' button; 'Delete integration partner(s)' with a 'Delete selected' button and a note '(Use checkboxes on left)'; and 'Get help' with two links: '? How long will it take to approve the integration partner?' and '? What if I don't see an integration partner I want to link to my account?'.

Select My Clients

The screenshot shows the f360 web application interface. At the top left, the f360 logo is displayed next to the date 'MARCH 10, 2014'. The top right corner contains a navigation bar with links: 'Welcome f360 Demo', 'Account Admin', 'Report a bug', 'Submit a comment', and 'Logout'. Below this, a secondary navigation bar includes 'My f360', 'Tools Home', 'My Clients' (circled in red), 'My Proposals', 'My Lists', 'My Models', 'Individual Tools', 'Settings', and 'Help Center'. The main content area is titled 'Integration Partners' and features a 'Report Queue' button. Below the title, there are tabs for 'Custom Holdings Directory', 'Due Diligence Criteria', and 'Integration Partners'. A sub-header reads 'Integration Partners Hide help text [-]'. A message states: 'Your active or pending integration partners are listed below. Add a new partner to your Toolkit account by clicking on the Add button in the I want to... column.' Below this is a table with columns: Partner Name, Account ID, Status, and Date Added. The table lists three entries for 'TD Ameritrade Veo' with account IDs 9876XXX, 8876XXX, and 7876XXX, all with a status of 'Approved' and a date of '01/27/2014'. To the right of the table are three panels: 'I want to...' with an 'Add' button, 'Delete integration partner(s)' with a 'Delete selected' button, and 'Get help' with two links: 'How long will it take to approve the integration partner?' and 'What if I don't see an integration partner I want to link to my account?'. 'Exit' buttons are located above and below the table.

Integration Partners

Custom Holdings Directory Due Diligence Criteria Integration Partners

Integration Partners Hide help text [-]

Your active or pending integration partners are listed below. Add a new partner to your Toolkit account by clicking on the Add button in the I want to... column.

Partner Name	Account ID	Status	Date Added
<input type="checkbox"/> TD Ameritrade Veo	9876XXX	Approved	01/27/2014
<input type="checkbox"/> TD Ameritrade Veo	8876XXX	Approved	01/27/2014
<input type="checkbox"/> TD Ameritrade Veo	7876XXX	Approved	01/27/2014

I want to...

Add integration partner

Add

Delete integration partner(s)

Delete selected
(Use checkboxes on left)

Get help

- How long will it take to approve the integration partner?
- What if I don't see an integration partner I want to link to my account?

Select Create

Welcome f360 Demo | Account Admin | Report a bug | Submit a comment | Logout

MARCH 10, 2014

f360

My f360 | Tools Home | My Clients | My Proposals | My Lists | My Models | Individual Tools | Settings | Help Center

My Clients

Client Cabinet | Data Import | Report Queue

Client Cabinet Hide help text [-]

Click the Create button to create a new client, or click on a client name to retrieve an existing client file. Use the filters to refine the client list or the search to quickly find a specific client file.

[Exit My Clients](#)

Search by client name (will search across all clients):

Choose one or multiple filters to refine your client list

Client Status: Client Type:

Custom Universe: Most recent data period:

<input type="checkbox"/> Client Name (Click to edit)	Type	Status	Custom Universe	Most Recent Data Period	Integration Partner	Copy
<input type="checkbox"/> ABC Company	Ret. Plan - Participant Directed	Current	No Restriction	1/31/2014	Establish Link	
<input type="checkbox"/> Alex Anderson	Ret. Plan - Committee Directed	Current	No Restriction	1/31/2014	Establish Link	
<input type="checkbox"/> Avant G. Arde 401k Plan	Ret. Plan - Participant Directed	Current	No Restriction	11/30/2013	Establish Link	
<input type="checkbox"/> Black Beard Inc. 401k Plan	Ret. Plan - Participant Directed	Prospective	No Restriction	1/31/2014	Establish Link	
<input type="checkbox"/> Blacktop Construction 401k Plan	Ret. Plan - Participant Directed	Current	Schwab Platform	1/31/2014	Establish Link	
<input type="checkbox"/> Bozeman Widonet 401(k) Plan	Ret. Plan - Participant Directed	Current	No Restriction	9/30/2013	Establish Link	
<input type="checkbox"/> Daily Bank Corp. 401k Plan	Ret. Plan - Participant Directed	Prospective	No Restriction	10/31/2013	Establish Link	
<input type="checkbox"/> Dave Sample	Ret. Plan - Participant Directed	Prospective	No Restriction	12/31/2013	Establish Link	
<input type="checkbox"/> Demo 1	Ret. Plan - Committee Directed	Current	No Restriction	12/31/2013	Establish Link	
<input type="checkbox"/> Demo Example - IRA Couple	Individual Investor	Prospective	No Restriction	12/31/2013	Establish Link	

I want to...

Create a new client

[Create](#)

Delete client(s)

Delete selected (Use checkboxes on left)

Download questionnaire

Individual Investor

Personal Trust

Foundation/Endowment

Ret. Plan Participant Directed

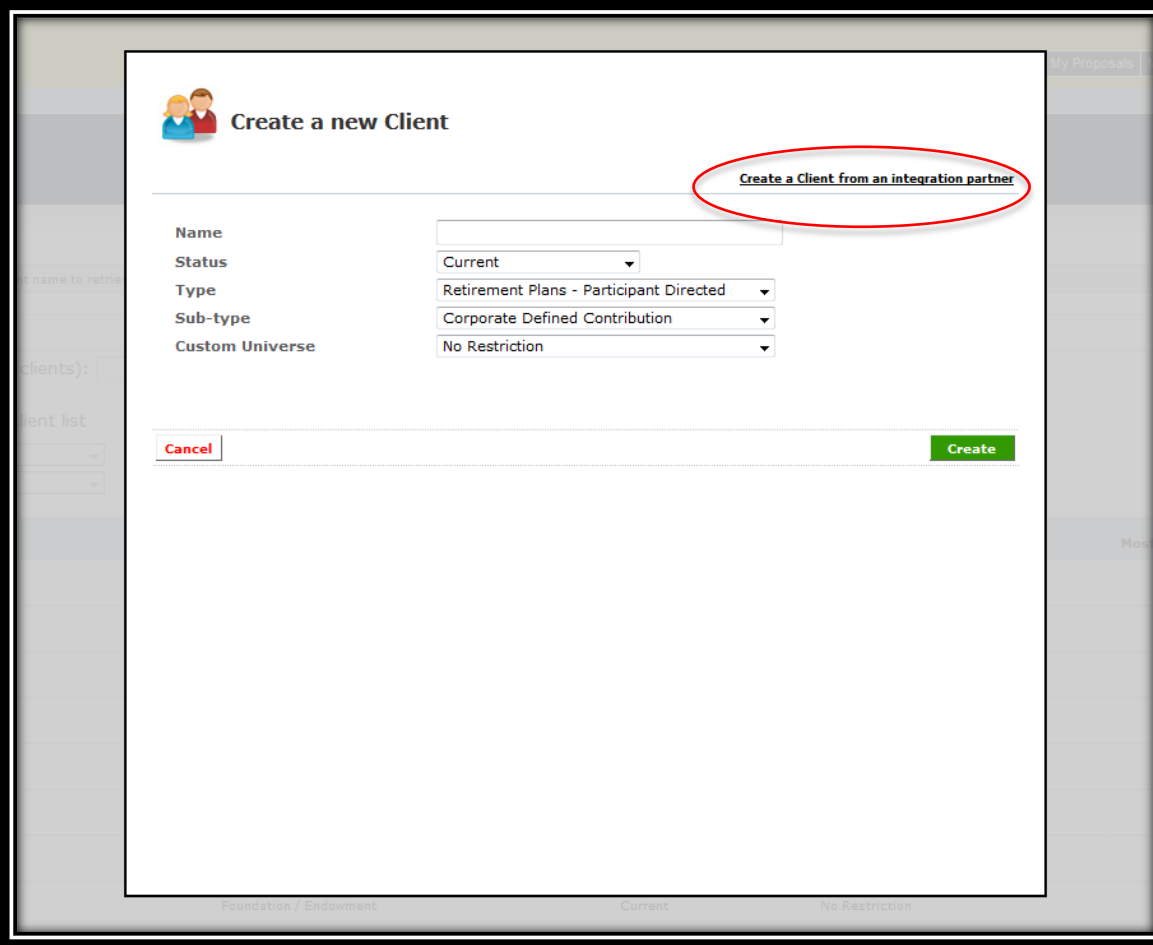
Ret. Plan Committee Directed


Get help

What is the difference between Current, Prospective, and Former clients?

I need help with the Data Questionnaires.

Select Create a Client from an integration partner



 **Create a new Client**

[Create a Client from an integration partner](#)

Name

Status

Type

Sub-type

Custom Universe

Check off the client(s) you want to link and select Create

Create a new Client


















Please select one or multiple accounts from the list below. Click the create button to establish fi360 client records for each account and populate them with the most recent data available from our partner.

[Create a Client manually](#)

<input type="checkbox"/>	Integration Partner	Account Name
<input checked="" type="checkbox"/>	TD Ameritrade Veo - 7876XXX	Sara Rogers - IRA

Ret. Plan - Participant Directed Prospective No Restriction 12/31/2013

When the link is complete, you will see the client created in the Client Cabinet

<input type="checkbox"/>	Jane Doe Prospect	Ret. Plan - Participant Directed	Prospective	No Restriction	9/30/2013	Establish Link	
<input type="checkbox"/>	Jane Smith IRA	Individual Investor	Current	No Restriction	10/31/2013	Establish Link	
<input type="checkbox"/>	JaneDoe - IRA	Individual Investor	Current	No Restriction	12/31/2013	TD Ameritrade Veo Unlink	
<input type="checkbox"/>	Joe Advisor	Ret. Plan - Participant Directed	Current	No Restriction	1/31/2014	Establish Link	
<input type="checkbox"/>	Joe Fiduciary Investment Advisor	Ret. Plan - Committee Directed	Current	No Restriction	10/31/2013	Establish Link	
<input type="checkbox"/>	Joe Prospect 401k	Ret. Plan - Participant Directed	Prospective	No Restriction	10/31/2013	Establish Link	
<input type="checkbox"/>	Joe's Bar	Individual Investor	Current	No Restriction	12/31/2012	Establish Link	
<input type="checkbox"/>	JohnSmith - IRA	Individual Investor	Current	No Restriction	1/31/2014	TD Ameritrade Veo Unlink	
<input type="checkbox"/>	MikeEasterday - IRA	Individual Investor	Current	No Restriction	12/31/2013	TD Ameritrade Veo Unlink	
<input type="checkbox"/>	New Client Name	Ret. Plan - Participant Directed	Current	No Restriction	10/31/2013	Establish Link	
<input type="checkbox"/>	Phoenix Foundation	Foundation / Endowment	Current	No Restriction	9/30/2013	Establish Link	
<input type="checkbox"/>	pi529 401k Plan	Ret. Plan - Participant Directed	Current	No Restriction	3/31/2013	Establish Link	
<input type="checkbox"/>	Princeton 401k	Ret. Plan - Participant Directed	Prospective	No Restriction	1/31/2013	Establish Link	
<input type="checkbox"/>	Red Star Foundation	Foundation / Endowment	Current	No Restriction	12/31/2012	Establish Link	
<input type="checkbox"/>	Rosina 401k	Ret. Plan - Participant Directed	Current	No Restriction	7/31/2013	Establish Link	
<input type="checkbox"/>	Sample 401k Client	Ret. Plan - Participant Directed	Current	No Restriction	10/31/2013	Establish Link	
<input type="checkbox"/>	Sample DB Client - MR	Ret. Plan - Committee Directed	Current	No Restriction	10/31/2013	Establish Link	

Questions?

tools@fi360.com

“TD Ameritrade, Inc. and fi360, Inc. are separate, unaffiliated companies and they are not responsible for each other’s services and products. ‘Veo® Integrated’ is an indication of programming compatibility. It does not imply any TD Ameritrade, Inc. recommendation of, endorsement of, warranty of, or fitness for use of, fi360’s products or services. TD Ameritrade is not responsible for information, opinions or services provided by fi360. Brokerage services provided exclusively by TD Ameritrade, Inc., member FINRA/SIPC/NFA. Veo is a trademark of TD Ameritrade, Inc. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank. Used with permission. All rights reserved.”