

January 14, 2016

## TD Ameritrade Institutional UMAX powered by Adhesion

Adhesion Wealth Advisor Solutions is very pleased to have partnered with **TD Ameritrade Institutional for their Unified Managed Account Exchange (UMAX)** offering for advisors. **UMAX powered by Adhesion** makes Adhesion's industry-leading, personalized UMA platform easily accessible to all advisors working with TD Ameritrade Institutional.

Adhesion Wealth Advisor Solutions is a trusted partner to RIA firms, providing a powerful delivery vehicle for your essential investment services. Adhesion's personalized, open architecture **UMA platform** provides the freedom to express your unique investment value proposition. 100% dedicated to the RIA community, Adhesion's services and technology were developed specifically with the independent advisor in mind.

With Adhesion, you get the power of a **single, integrated platform** that offers a seamless, exceptional investing experience for advisors and their clients. Flexible UMA investing options span:

- (1) Employing a model portfolio from our vast roster of SMA managers and ETF strategists;
- (2) Advisor-built allocations blending managers, strategists, ETFs and mutual funds;
- (3) Firm-built allocations usable by all advisors;
- (4) Leveraging leading investment research and consulting firms for manager selection and due diligence, and/or leveraging their turnkey allocations and manager selections.

All delivered on your behalf via Adhesions' innovative UMA platform, which removes barriers to implementation instead of adding them.

Adhesion platform benefits also include:

- (1) Performance reporting and online client portal;
- (2) Paperless workflow integrating client profiling – proposal generation – account enrollment;
- (3) Investment, client, practice and compliance insights via a sophisticated advisor dashboard with data mining;
- (4) Advisor training, fee billing and responsive support;
- (5) Integration with TD Ameritrade Institutional means Veo® Single Sign-On for you and simple, discounted pricing for your clients.

Click here to view a [1-page summary of UMAX powered by Adhesion](#). Or contact directly the **Adhesion UMAX Consulting Team** at [UMAX@adhesionwealth.com](mailto:UMAX@adhesionwealth.com) or 980.225.9984.