

- PRESS
- Press Releases

TD Ameritrade Announces Strategic Relationship with AARP

AARP® | Investment Services from TD Ameritrade Will Offer Value-Oriented Financial Products to AARP Members

OMAHA, Neb. - TD Ameritrade, Inc. ("TD Ameritrade"), a brokerage subsidiary of TD Ameritrade Holding Corporation (Nasdaq: AMTD), today launched a new investment services program for AARP members. AARP® | Investment Services from TD Ameritrade will provide AARP's nearly 38 million members with special offers on some of TD Ameritrade's investment products and services.

AARP members who open a qualifying account and fund it with \$3,000 or more within 60 days of opening, can receive commission-free trades, free investor education and up to \$1,000 in cash or gift cards. For AARP Members who invest over \$25,000 in an Amerivest® managed portfolio, management fees will be waived for the first year. TD Ameritrade also offers a \$75 transfer fee rebate when clients transfer \$5,000 or more from another financial institution.

Beyond these exclusive offers for AARP members, TD Ameritrade offers brokerage accounts - including IRA accounts - with no maintenance fees or deposit minimums (service and exception fees still apply), and a commission-free ETF program. Enrollment in the program provides access to over 100 commission-free ETFs. Additionally, TD Ameritrade offers access to retirement tools and calculators to help track savings and investing goals, rollover consultants, retirement consultants, fixed income specialists and investment consultants to offer financial support and guidance with over 100 branches nationwide.

In addition, TD Ameritrade is also offering AARP members a special customized list of mutual funds and exchange traded funds (ETFs) screened and selected by the professionals at Morningstar Investment Management, LLC and TD Ameritrade with a focus on income generation and target date goals. Visit www.tdameritrade.com/aarp for complete offer and service details.

"The idea that retirement is a set date in your early 60s is a thing of the past," said David Clingman, managing director of retirement and annuities at TD Ameritrade. "People are living longer, working longer and looking to live life to the fullest. We understand that and we want to help the millions of AARP members save and invest for all their financial goals, whether that's a home improvement or saving for an exotic vacation, and give them the confidence that their financial life is in order."

"We are delighted to announce this new relationship with TD Ameritrade, which shares our commitment to helping people age 50-plus plan for their retirement," said Mitch Stevens, Senior Vice President, Financial Products & Services, AARP Services Inc. "The Investment Services program from TD Ameritrade will help AARP members save and invest to achieve their long-term financial goals."

"We feel a great sense of pride in our ability to combine both an interactive online and mobile experience for our clients with the personalized, one-on-one service they receive with our investment consultants," said Clingman. "We can meet the needs of this tech-savvy market that still wishes for more human interaction."

About TD Ameritrade Holding Corporation

Millions of investors and independent registered investment advisors (RIAs) have turned to TD Ameritrade's (Nasdaq: AMTD) **technology, people and education** to help make investing and trading easier to understand and do. 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 2014 and 2016 U.S. Olympic and Paralympic Teams**, as well as an **official sponsor of the National Football League** for the 2014, 2015 and 2016 seasons, TD Ameritrade has time and again been **recognized as a leader** in investment services. Please visit TD Ameritrade's **newsroom** or www.amtd.com for more information, or read our stories at **Fresh Accounts**.

Brokerage services provided by TD Ameritrade, Inc., member FINRA (www.FINRA.org) /SIPC (www.SIPC.org)

Carefully consider the investment objectives, risks, charges and expenses before investing. A

prospectus, obtained by calling 800-669-3900, contains this and other important information about an investment company. Read carefully before investing.

Morningstar Investment Management, LLC is a registered investment advisor and wholly owned subsidiary of Morningstar, Inc. The Premier List mutual funds and commission-free ETFs selected by Morningstar Investment Management have been derived from a universe of mutual funds and ETFs, respectively, made available through TD Ameritrade. The universe does not include all mutual funds and ETFs available in the marketplace. Both the universe of mutual funds and ETFs defined by TD Ameritrade, as well as the commission-free ETFs and Premier List of mutual funds, are subject to change at any time and without notice. Particular Premier List mutual funds and commission-free ETFs may not be appropriate investments for you under your circumstances, and there may be other mutual funds, ETFs, or investment options offered by TD Ameritrade that are more suitable. Morningstar may have more favorable opinions of certain mutual funds or ETFs which are not included in the universe of mutual funds and ETFs made available through TD Ameritrade. The Morningstar selections were based on qualitative factors and quantitative analysis conducted by Morningstar Investment Management. Neither Morningstar Investment Management nor Morningstar, Inc. is affiliated with TD Ameritrade and its affiliates. Morningstar, the Morningstar logo, Morningstar.com, Morningstar Tools are either trademark or service marks of Morningstar, Inc.

Amerivest Portfolios is an investment advisory service of Amerivest Investment Management, LLC (Amerivest), a registered investment advisor. For more information, please see the Amerivest Disclosure Brochure (ADV Part 2) <http://www.tdameritrade.com/forms/TDA4855.pdf>.

AARP is separate from and not affiliated with TD Ameritrade, which is not responsible for their services or policies.

Source: TD Ameritrade Holding Corporation

#

About AARP AARP is a nonprofit, nonpartisan organization, with a membership of nearly 38 million, that helps people turn their goals and dreams into real possibilities, strengthens communities and fights for the issues that matter most to families such as healthcare, employment and income security, retirement planning, affordable utilities and protection from financial abuse. We advocate for individuals in the marketplace by selecting products and services of high quality and value to carry the AARP name as well as help our members obtain discounts on a wide range of products, travel, and services. A trusted source for lifestyle tips, news and educational information, AARP produces AARP The Magazine, the world's largest circulation magazine; AARP Bulletin; www.aarp.org; AARP TV & Radio; AARP Books; and AARP en Español, a Spanish-language website addressing the interests and needs of Hispanics. AARP does not endorse candidates for public office or make contributions to political campaigns or candidates. The AARP Foundation is an affiliated charity that provides security, protection, and empowerment to older persons in need with support from thousands of volunteers, donors, and sponsors. AARP has staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands. Learn more at www.aarp.org.

About AARP Services Inc. AARP Services Inc., founded in 1999, is a wholly-owned taxable subsidiary of AARP. AARP Services manages the provider relationships for and performs quality control oversight of the wide range of products and services that carry the AARP name and are made available by independent providers as benefits to AARP's millions of members. The provider offers currently span health products, financial products, travel and leisure products, and life event services. Specific products include Medicare supplemental insurance; credit cards, auto and home, mobile home and motorcycle insurance, life insurance and annuities; member discounts on rental cars, cruises, vacation packages and lodging; special offers on technology and gifts; pharmacy services and legal services. AARP Services also engages in new product development activities for AARP and provides certain consulting services to outside companies.

CONTACT:

For Media:

Kim Hillyer, 402-574-6523, kim.hillyer@tdameritrade.com
Mark Bagley, 202-434-2504, mbagley@aarp.org

For Investors:

Jeff Goesser, 402-597-8464, jeffrey.goesser@tdameritrade.com
