

# Your Independence East service team

 **Kelsey Bindon, Team Manager**



800-400-6288; option 9, ext 500726  
[kelsey.bindon@tdameritrade.com](mailto:kelsey.bindon@tdameritrade.com)

 **Phone**

800-400-6288

Access the following departments by pressing the number indicated below on your keypad. Please note the individual hours of operation for each department.

- |   |  |   |
|---|--|---|
| ■ Press <b>(1)</b> for <b>Trading</b><br>Monday–Friday<br>7:30 a.m.–8 p.m. ET | ■ Press <b>(2)</b> for<br><b>your service team</b><br>Monday–Friday<br>8:30 a.m.–8 p.m. ET | ■ Press <b>(3)</b> for<br><b>Technology Services</b><br>Monday–Friday<br>7 a.m.–8 p.m. ET |
|---|--|---|

 **Email**

[independence@tdameritrade.com](mailto:independence@tdameritrade.com)

Use this team email address to submit general inquiries only. For client-specific data or forms, please use the Secure Message Center in Veo® or Veo One®.

 **Fax**

866-226-4619

 **Processing cut-off times (ET)\***

#### New accounts

Applications – 4 p.m.  
Maintenance – 4 p.m.  
Check-writing forms\*\* – 4 p.m.

#### Incoming transfers

ACATS, mutual funds, non-ACATS and rollovers\*\* – 1 p.m.

#### Cash management

Check requests – 3 p.m.  
Internal transfers/LOAs – 1 p.m.  
IRA distributions – 1 p.m.  
Wire requests – 1 p.m.  
Move money forms\*\* – 1 p.m.

 **Online resources**

**Veo One** – [veoone.tdainstitutional.com](http://veoone.tdainstitutional.com)

Conveniently and securely submit sensitive client information, including forms and documents, to your service team through the Message Center on Veo One.

**Conferences** – [tdaconferences.com](http://tdaconferences.com)

**Public site** – [tdainstitutional.com](http://tdainstitutional.com)

 **Physical mail**

#### Standard U.S. mail

TD Ameritrade Institutional  
P.O. Box 650567  
Dallas, TX 75265-0567

#### Overnight mail

TD Ameritrade Institutional  
7801 Mesquite Bend Drive, Ste 112  
Irving, TX 75063-6043

 **Social media**

**Twitter** – [@TDA4advisors](https://twitter.com/TDA4advisors)

**LinkedIn** – [linkedin.com/company/tdameritradeinstitutional](https://linkedin.com/company/tdameritradeinstitutional)

**Facebook** – [facebook.com/tdameritradeinstitutional](https://facebook.com/tdameritradeinstitutional)

**Blog** – [tda4advisors.com](http://tda4advisors.com)

## For your clients

### Phone

800-431-3500

Your clients can access the following services by pressing the number indicated below on their telephone keypad. Please note the individual hours of operation.

- |  |  |
|--|--|
| ■ Press <b>(1)</b> for <b>account information</b><br>Monday–Friday<br>8:30 a.m.–5 p.m. ET                          | ■ Press <b>(4)</b> for <b>Technology Services</b><br>Monday–Friday<br>7 a.m.–8 p.m. ET |
| ■ Press <b>(2)</b> for assistance with <b>login</b><br>Monday–Friday<br>8:30 a.m.–5 p.m. ET                        | ■ Press <b>(5)</b> for <b>Trading</b><br>Monday–Friday<br>7 a.m.–8 p.m. ET             |
| ■ Press <b>(3)</b> for the <b>mailing address</b><br>and <b>fax number</b><br>Monday–Friday<br>8:30 a.m.–5 p.m. ET |  |

### Secure Online Access

Client platform – [advisorclient.com](https://advisorclient.com)

**AdvisorClient®** enables clients to view their real-time account balances, positions, transaction history, tax documents and more.

### AdvisorClient Mobile

Allows your clients to deposit checks remotely from their Apple® and Android™ mobile devices.

### On-demand training

Available within the platform to help your clients understand the features available.

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Dallas, TX 75265-0567

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TD Ameritrade Institutional  
7801 Mesquite Bend Drive, Ste 112  
Irving, TX 75063-6043

\*Items that are in good order will be processed on the same day.

\*\*Items will be submitted for processing, but will not necessarily be completed on the same day.

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