Open New Accounts in Minutes With Orion’s Latest TD Ameritrade Integration Enhancements

Integration is the glue that holds your tech stack together. And along with your portfolio management technology, one of the most important components is your custodial data platform. Together, they make up the foundation of your tech stack. So it’s no wonder many advisors choose to keep these two tech-stack behemoths in sync, leaving less room for data discrepancies and ensuring a greater chance for data continuity.

Here at Orion, we know how important it is for our advisors to have a seamless connection with their custodians. That’s why we’re rolling out a number of enhancements to our custodial integrations this year, starting with TD Ameritrade Institutional.

Our Current Integration State

Orion and TD Ameritrade Institutional have enjoyed a long history as partners, dating back to Orion’s start. From those humble beginnings, our relationship has grown to include many integration points that help our mutual clients streamline their day-to-day operations. Our current integration includes:

Veo® Integrated Through Orion Connect

- Insight Tile with Balances, Positions, Transactions, and Alerts
- Veo® Advanced alerts available in the Orion notification system
- TD Ameritrade Institutional Statements available in the Orion Client Portal

Veo One® Integration Points with Orion

- Single sign-on
- Access Orion Client Account data in Veo One®
- Household overview

The Newest Enhancement

To continue streamlining your operations, we're releasing a new enhancement:

TD Ameritrade Institutional's Veo® Account Opening Wizard Integration

The days of processing reams of paperwork are over! With our new Account Wizard integration, you can open TD Ameritrade Institutional Accounts in just minutes, saving you time and multiple steps in the process.

How to Set Up the Integration

- Go to Settings > Integrations > TDAI Veo One and enter your TD Ameritrade Institutional Veo One credentials
- Enable the TDAI Digital Account Opening Privilege in **Manage Users** (Roles > Privileges > Actions > Integrations > TDAI Digital Account Opening)

Making the Most of the Integration

- Find the shell account that you want to send to TD Ameritrade Institutional in the **New Accounts Center.**
- **Right-click** on the account and select "TD Ameritrade New Account" to send the account into the TD Ameritrade Institutional system. Be sure to allow pop-ups from TD Ameritrade Institutional so the new window opens.
- Follow the steps in TD Ameritrade Institutional's system to complete the forms and send them to the client for review and signature.
- Once the client digitally signs the forms, the account will be processed and opened automatically.

To learn more about how our integration with TD Ameritrade Institutional can help simplify your business, join us for our upcoming TD Ameritrade webinar on

May 15th at 1:30 p.m. CT.

Disclosure:

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