

Service Team Contact Information

XY Financial Planning Network

This material is designed for an investment professional audience, primarily Registered Investment Advisors (RIAs). TD Ameritrade Institutional, Division of TD Ameritrade, Inc., member FINRA/SIPC. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank. ©2016 TD Ameritrade IP Company, Inc.



Service Team Contact Information for XY Planning Network



7:30 am – 7:00 pm , Central Time

Phone: (866) 418-0401

Option 1: Trading

Option 2: Relationship Service Team*

Option 3: Technology

**If caller does not select an option, the call will roll to the general Independence service team.*

Fax: (866) 226-4617



XYPlanningNetwork@TDAmeritrade.com



Regular

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

Overnight

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

ESCALATION PATH

For escalated issues, when using the contact information to the left, please ask the TDA representative to “escalate through the XYPN inbox”. TDA has created an internal inbox to handle urgent XY items. This inbox is handled by management and senior associates.

Digital information

Veo - Advisor Website

Our account management and trading platform designed with input from advisors like you.

[AdvisorServices.com](https://www.advisorservices.com)

Client Portal

Give your clients the ability to view their account balances, positions, transaction history and more within our secure client website.

[AdvisorClient.com](https://www.advisorclient.com)

Conferences & Events

Attend one of our world-class events for an opportunity to connect with peers and uncover best-practices to help your business thrive.

[TDAmeritradeConferences.com](https://www.tdameritradeconferences.com)

Public Site

Learn about our products and services. Gain access to resources and ideas for you, your clients, and your business.

[TDAInstitutional.com](https://www.tdainstitutional.com)

Social Media



facebook.com/TDAmeritradeInstitutional/



@TDA4advisors



youtube.com/TDA4advisors



linkedin.com/company/tdameritradeinstitutional



tda4advisors.com