



## Release of Information

To Whom It May Concern:

TD AMERITRADE Institutional, a division of TD AMERITRADE, Inc. (collectively "TD AMERITRADE") has entered into an alliance with Intra-Agent Services, Inc (together its affiliates, collectively "Intra-Agent"). The alliance is intended as a value-added service to independent investment advisors ("Advisors") who custody customer assets at TD AMERITRADE.

In connection with this data download, Advisor customer information and/or other Confidential Information may be provided by TD AMERITRADE to Intra-Agent. "Confidential Information" herein is deemed to include confidential client, business, financial or technical information or data proprietary to TD AMERITRADE that is competitively and commercially valuable to TD AMERITRADE and not generally known, or available by legal means, to third parties. Intra-Agent in turn may use the Confidential Information to enable Advisors to access data. TD AMERITRADE and Intra-Agent have entered into a Confidentiality Agreement in connection with this service.

Your signature below will acknowledge your agreement to the release by TD AMERITRADE of Confidential Information to Intra-Agent relating to your Advisor customers. You further hereby represent that you have obtained from your Advisor customers all authorizations necessary for release of this information in a manner consistent with applicable privacy laws and regulations. You agree to indemnify and hold harmless TD AMERITRADE from and against any and all claims arising in connection with this agreement and TD AMERITRADE's reliance thereon.

Please indicate your agreement to the foregoing by signing and returning a copy of this agreement to TD AMERITRADE Technology Services at fax # 858-678-2855.

Acknowledged and agreed:

\_\_\_\_\_  
Advisor Name (print)

\_\_\_\_\_  
TD Ameritrade rep code(s)

\_\_\_\_\_  
Advisor Signature

\_\_\_\_\_  
Broker / Dealer

- Revised Feb. 2009. Submit requests for updated forms to (858)678-2855