



## **55ip Offers Seamless Integration with TD Ameritrade's Veo One® Platform**

*Single Sign-On Capabilities*

*Enables Advisors to Deliver Tax-Smart Model Management for Clients*

**BOSTON, April 16, 2020** -- 55ip, the investment strategy engine that enables tax-smart portfolio transition and model management for financial advisors, today announced a new integration with TD Ameritrade's Veo One® platform, providing a single sign-on (SSO) solution between the two platforms

The two platforms will be seamlessly integrated through SSO access in both locations. Within 55ip, Veo One® users will now be able to move across the two platforms and easily analyze and implement tax-smart transition strategies, as well as ongoing tax management for their accounts.

"We are excited about this partnership and we have now made it even easier for advisor clients of TD Ameritrade to access our tax technology," said Swati Bairathi, Chief Product Officer at 55ip. "55ip's ability to transition and manage accounts with intelligent automation saves significant time for advisors, and this seamless integration is just one more way we can help advisors be more efficient."

Advisor clients of TD Ameritrade have had access to [BlackRock models](#) on 55ip's platform since December 2019, when the co-branded BlackRock and 55ip's capabilities were launched to help advisors embrace a models-based practice. Advisors will now have quicker access and seamless integration with their client accounts to continue utilizing BlackRock Model Portfolios alongside 55ip's platform for tax-smart transition and management.

"Automated tax-smart transition and management are key capabilities for advisors to deliver value for clients, especially in this market environment," said Paul Gamble, CEO at 55ip. "Our integration with Veo One enables advisors to provide this value across their client base at scale."

### **About 55ip**

55ip's investment strategy engine and platform allow advisors to both own and automate their investment strategies, fueling a differentiated value proposition while freeing critical time to focus on client relationships. With 55ip, advisors can incorporate sophisticated quantitative capabilities and scalable portfolio implementation into their



practices, facilitating the entire investment management workflow from client-level strategy customization through trade execution. More information is available at <https://www.55-ip.com>. For media inquiries, contact [PR@55-ip.com](mailto:PR@55-ip.com)

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