

BUILD PRESERVE ENDOW

# Wealth Manager

## Better Than Airbags

Does your practice need GPS? You may be interested, then, in Roadmap, an online advisory practice tool developed by Twin Cities-based ActiFi that is available exclusively through TD AMERITRADE Institutional.

You might say that Roadmap takes the pain and suffering out of translating those pesky high-level business objectives of yours into definable and executable tasks. Or, as ActiFi CEO Spenser Segal puts it, "With Roadmap, advisors will be able to take the ideas they have for their business, get them into an actionable plan, and turn them into reality."

Just as a GPS system needs your input, so Roadmap needs a TD AMERITRADE Institutional Solutions Consultant to help you define business goals such as growth, time management, risk reduction and enhancing client value. Roadmap will then offer specific strategies, tactics and hypothetical outcomes—even assigning tasks to staff members—in a report that can be saved in your firm's ongoing strategic plan.

But the road doesn't end there! Again with the assistance of your TD AMERITRADE consultant, you'll create a Roadmap Accountability Dashboard to monitor progress, adapt existing plans and add new strategies.

Nancy R. Mandell is managing editor of *Wealth Manager*.