



## "The Invested Life" Launches Season 2, Announces New Cast Lineup

*The online reality series on investing is back for more, just when investors need it the most*

OMAHA, Neb.--(BUSINESS WIRE)-- TD Ameritrade Holding Corporation ("TD Ameritrade") (NASDAQ: AMTD) announces the launch of the second season of "[The Invested Life](#)," an online reality series featuring real people facing some of today's most common financial challenges — including debt management, college savings, retirement planning, taxes, real estate and smart investing.

"The Invested Life" airs for three seasons over a nine-month period. The series and site experience were developed by MSN and Ogilvy Entertainment. Episodes of the second season of "The Invested Life," including financial planning tools, advice from independent financial experts and blog postings from cast members, can be found at <http://TheInvestedLife.msn.com>.

The online series, which is sponsored by TD Ameritrade, pairs everyday investors with independent financial experts who help them take control of their finances. The program is supported with online videos, news stories, financial tools and resources, cast blogs and community forums that encourage viewers to engage with cast members, learn from their experiences and ultimately take action for themselves. Cast members include real people from a variety of locations across America, each facing a different financial situation.

Cast members to be featured in the latest season of "The Invested Life" include:

- [The Opinion Seekers](#) — **Steven Long & Wendy Smith** of Portland, Ore. earn a high salary and have little problem saving money, but the bulk of their income is deposited into savings accounts and not building wealth. They're seeking coaching on how to properly balance their accounts.
- [The Semi-Pro](#) — **Tom Stanley** of Chicago invested over \$500,000 in the stock market — but lost nearly everything when the dot-com bubble burst. He's looking for a coach to guide him and to help his wife, Kristen, who hopes to learn more about the family's finances.
- [The DIY-er](#) — **Melanie Kuhr** of Dallas needs a little help streamlining and executing a plan for financial independence for herself and her children following a tough divorce from her college sweetheart.
- [The Player](#) — **Dan Nainan** of New York needs to approach his finances from two fronts: diversify and develop the nearly \$300,000 in his own actively managed portfolio while optimizing his LLC/career, and as executor of the family estate, prepare for his new responsibilities involving his parents' trust.
- [The Rookies](#) — **Kiel & Megan Pighetti** of Denver are a young couple who want to establish strong financial foundations to allow their family to grow comfortably. They're debt-free and confident about their financial future, but need coaching for strategies they can rely on.
- [The Planner](#) — For **Judith Kelch** of Miami, the past two years have been difficult after the sudden death of her husband, followed by a big hit in the stock market. These events have motivated Judith to educate herself about her finances and take the reins.
- [The Adventurer](#) — **Joshua Steen** of Los Angeles is knowledgeable about money, but needs guidance to figure out how to make his money work for him both in the short- and long-term. He is young, so there's no better time than now.

And research shows that the timing has never been better for these individuals to seek financial guidance. A new [survey](#) released by TD Ameritrade found that 71 percent of investors agree that the economic events of the past two years have compelled them to learn more about managing their money.

"Investors are re-evaluating their approaches when it comes to money and investing, which makes a program such as "The Invested Life" all the more relevant to the changing needs and attitudes of today's investors," said Stuart Rubinstein, managing director of client engagement, TD Ameritrade, Inc. "They've learned from their mistakes and other life experiences and are now taking action to better help them prepare for the future."

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### Survey Methodology

These results are based on a survey conducted by Maritz, Inc. on behalf of TD Ameritrade Holding Corporation. Nine hundred sixty-three (963) adults between 21 and 80 years of age participated in a telephone survey from November 16 through

December 7, 2010. The margin of error in this survey is  $\pm 3.2\%$ . This means that in 19 cases out of 20, survey results based on 963 respondents will differ by no more than 3.2 percentage points in either direction from what would have been obtained by seeking the opinions of all adults living in the United States ages 21 through 80. Maritz, Inc. and TD Ameritrade Holding Corporation are separate, unaffiliated companies and are not responsible for one another's products and services.

### **About Maritz**

St. Louis-based Maritz is a sales and marketing services company, which helps companies achieve their full potential through understanding, enabling and motivating employees, channel partners and customers. Maritz provides market and customer research, communications, learning solutions, incentive initiatives, rewards and recognition, effective meeting, event and incentive travel management services, and customer loyalty programs. For more information, visit [www.maritz.com](http://www.maritz.com) or call 1-877-4MARITZ.

### **About TD Ameritrade Holding Corporation**

TD Ameritrade Holding Corporation (NASDAQ: AMTD), through its brokerage<sup>1</sup> and education<sup>2</sup> subsidiaries, combines innovative trading technology, easy-to-use and understand [trading tools](#), investment services, investor education and superior client service to create a market-leading financial services experience. Home to *Kiplinger's* #1 online broker<sup>3</sup>, the award-winning thinkorswim trading technology<sup>4</sup>, and the respected Investools investor education program, TD Ameritrade provides millions of retail investors, traders and independent registered investment advisors with the tools, service and support they need to help build confidence in today's rapidly changing market environment. For more information and resources for journalists, please visit the TD Ameritrade newsroom at [www.amtd.com](http://www.amtd.com).

<sup>1</sup> TD Ameritrade, Inc., member FINRA ([www.FINRA.org](http://www.FINRA.org))/SIPC([www.SIPC.org](http://www.SIPC.org))/NFA([www.nfa.futures.org](http://www.nfa.futures.org)), and TD Ameritrade Clearing, Inc., member FINRA/SIPC.

<sup>2</sup> Investools is an education subsidiary of TD Ameritrade Holding Corporation. Investools does not provide financial advice and is not in the business of transacting trades. Investools, Inc. and TD Ameritrade, Inc. are separate but affiliated companies that are not responsible for each other's services or policies.

<sup>3</sup>TD Ameritrade was ranked #1 and received an overall score of 5 stars (tied for first place with one other broker), in the Kiplinger's Online Broker Ratings, *Kiplinger's Personal Finance*, 02/2011. Fourteen brokers were rated in the categories: Costs, Web site usability, Investment choices, Customer service, and Research and tools.

<sup>4</sup> thinkorswim, prior to joining TD Ameritrade, earned 4.9 stars, the top score, in the category "Trading Technology", and was rated #1 overall online broker in *Barron's* ranking of online brokers, 3/15/2010. thinkorswim was evaluated versus others in eight total categories, including trade experience, trading technology, usability, range of offerings, research amenities, portfolio analysis and reporting, customer service and education and costs. thinkorswim topped the list in 2006, 2007, 2009, and 2010 with the highest weighted-average score. *Barron's* is a registered trademark of Dow Jones & Company © 2006—2010.

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