



Overview

TD AMERITRADE is one of America's largest – if not *the* largest – online brokerages – a combination of two powerhouse financial companies, Ameritrade and TD Waterhouse. TD AMERITRADE Holding Corporation, through its brokerage subsidiaries, provides a dynamic balance of investment products and services that furthers the Independent Spirit of individual investors.

The Situation

Ameritrade acquired TD Waterhouse but had to remain in a quiet period for approximately six months after announcing the deal. The communications team was unable to discuss the new brand, new company or new executives until the official closing of the deal, which happened January 25, 2006.

Ervin & Smith received the task of creating a special event to introduce the new company and its executives to major financial media outlets, including CNBC, MarketWatch and *The Wall Street Journal*.

Ervin & Smith:

Determined the key message, "We are TD AMERITRADE," which helped create a unified voice and message.

- Worked with the TD AMERITRADE Corporate Communications team to plan a special press conference at the NASDAQ in New York City.
- Worked with the NASDAQ event planners to have TD AMERITRADE CEO Joe Moglia ring the opening bell on the first day TD AMERITRADE stock would trade.

Secured a meeting room to hold the press conference and breakfast with the new TD AMERITRADE executive team.

- Developed unique invitations to announce the new "Bigger, Better, Stronger" company, TD AMERITRADE.
- Sent smaller invitation cards, giving reporters the chance to RSVP to a Meet & Greet with the new TD AMERITRADE executives, who had previously not given interviews about the company's future plans.
- Developed a Hypercolor press kit to highlight the major change in the TD AMERITRADE brand – the color green, which was distributed at the event.
- Placed setting cards that were made for reporters:
"We are TD AMERITRADE"
"You are (fill in the blank)"
- Create a press conference/media backdrop with the new company logo, as well as a looping NASDAQ video, which was played on the NASDAQ sign in Times Square.
- Put together a gift bag for reporters, containing a TD AMERITRADE T-shirt and Hypercolor mug that changed from blue to green when hot liquid was added.

Results

The press kits, invitations and reporter gifts – all of which featured an entertaining and interactive Hypercolor component – helped to reinforce the new company name and new brand colors with a strong and unified message, "We are TD AMERITRADE."

The launch event garnered coverage on major financial programs, including Cramer's Mad Money, CNBC, ROBTv and Bloomberg TV.

The story was also covered by major syndications, including the AP, Dow Jones Financial Wire and Knight Ridder.

Case Study:

TD AMERITRADE NASDAQ BRAND LAUNCH

TD AMERITRADE Brand Launch media impressions, January 2006 – February 2006*

CBS MarketWatch – 4,149,372

TheStreet.com – 1,926,961

The Associated Press – 9,099,000

The Wall Street Journal – 2,049,000

Securities Industry News – 2,615

Computerworld – 180,065

Omaha World-Herald – 188,866

The Kansas City Star – 266,676

San Jose Mercury News – 242,865

The Richmond Times-Dispatch – 186,866

The Toronto Star – 454,529

Media Impressions: 16,902,715

*Based on LexisNexis clippings