

STARLIGHT PORTFOLIOS | Capabilities Comparison



The following overviews the capabilities offered by both Starlight Portfolios platform offerings – TD Ameritrade (TD) with AdvisorEngine (AE) and Schwab with Institutional Intelligent Portfolios (IIP).

	Schwab/IIP	TD/AE	Notes
WHITE LABEL			
Custom URL	X	X	AE URL can be chosen by advisor, IIP URL is based on assigned advisor master code
Logo	X	X	
Firm positioning statement	X	X	
Firm contact information	X	X	
Color palette selection	X	X	
SUPPORT / TRAINING			
Account opening training		X	Training also provided by TLG Advisors
Advisor training		X	Training also provided by TLG Advisors
Phone support <i>technology</i>	X		
Phone support <i>account management</i>	X	X	
Phone support <i>investor</i>	X		
Online support <i>advisor</i>	X	X	
Online support <i>investor</i>	X		
REPORTING			
Standard reports	X	X	
Customized reports		X	
OTHER FEATURES			
PORTFOLIOS			
Multiple account management types	X	X	
Active management	X	X	
Passive management		X	
Blend management		X	
Account minimum	\$5,000	\$0	
ADVISOR DASHBOARD / FEATURES			
Co-Browse / Realtime mirroring	X	X	
Basic CRM functions		X	
User guide	X	X	
Advisor-led onboarding	X	X	IIP is available in a separate login at Schwab Advisor Center
Mobile App or Mobile Ready	X	X	
INVESTOR DASHBOARD / FEATURES			
Account aggregation	X	X	
Goal-based planning		X	
Secure document vault	X	X	
FAQs	X	X	
Mobile app or Mobile ready	X	X	Schwab and TD provide mobile apps for clients
Investor-led onboarding	X	X	
Support Material / Enrollment Guide	X	X	