



Kate Healy - Managing Director, Generation Next

Kate Healy is Managing Director, Generation Next, focused on advocacy for sustainability issues facing the RIA industry. Healy leads TD Ameritrade Institutional's NextGen and Women's Leadership Initiatives, which support the future of the profession through programs designed to raise visibility, provide support and resources to guide professional development of the next generation of advisors. She is a member of the Company's Diversity & Inclusion committee.

Healy is widely recognized as a leading advocate for the next generation of financial planners, for women advisors and for the financial planning profession. *Wealthmanagement.com* named her to the 2018 "10 to Watch" list. In 2016, *Investment Advisor* magazine named Healy as one of the industry's 25 most influential people. Healy was named to *InvestmentNews'* inaugural "Women to Watch" in 2015. Additionally, she was TD Ameritrade's 2014 Impact Award winner for Diversity and Inclusiveness.

She is a trustee for the Foundation for Financial Planning and a member of the Invest in Others board. Kate also is a founding member of the CFP Board's Women's Initiative (WIN) Council, the Center for Financial Planning's Advisory Council and a founding member of the Center's Diversity Advisory Board.

Healy has spent more than 20 years in a variety of roles supporting the program development and marketing of financial and estate planning services in the financial planning industry.

Before moving to her full-time advocacy role in July 2017, Healy was managing director of marketing for TD Ameritrade Institutional, responsible for the development of marketing strategies and programs to help increase awareness and deepen relationships with nearly 5,000 independent RIAs that custody with TD Ameritrade Institutional.

Healy, who joined TD Ameritrade in 2008, previously served as a director of marketing responsible for promoting the firm's technology and investment products offerings, as well as supporting the firm's advocacy and client loyalty efforts.

Healy holds a Bachelor of Arts in Economics from Rutgers College and has completed the Securities Industry Institute program, sponsored by the Securities Industry and Financial Markets Association (SIFMA) at the Wharton School of Business.