

FOR IMMEDIATE RELEASE

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E*TRADE TO HOST SCOTTSDALE EDUCATION DAY

Complimentary education offered to investors and traders of all experience levels

SCOTTSDALE, December 1, 2016 — E*TRADE Financial Corporation (NASDAQ: ETFC) today announced it will host an Education Day at [The Phoenician](#) in Scottsdale on Saturday, December 3, 2016. The day offers a number of complimentary sessions for investors and traders interested in learning from financial professionals.

- Investors can tailor their own experience from a selection of 19 specialized sessions.
- Financial Consultants from E*TRADE’s Scottsdale branch and members of E*TRADE’s Options and Futures Specialist Team will be on site all day to answer questions about investments, retirement planning, options trading, and more.
- Education Day sessions run from 9:00 a.m.–5:00 p.m.

Sessions run concurrently across three tracks and range from investing basics to advanced options strategies. Investors and traders can attend any sessions across all tracks:

Time (PT)	Track A	Track B	Track C
9:00– 10:00 a.m.	What is a Stock Worth?¹ Explains essential factors in fundamental analysis and stock valuation, including company size, profitability, and growth.	Getting Started with Options² Explains the basic concepts and definitions behind options.	Getting Started with Retirement Accounts¹ Discusses IRAs, retirement plans for self–employed individuals, distribution options for job changers, and more.
10:10– 11:10 a.m.	What Does a Stock Chart Tell Us?¹ Explains the basic principles of technical chart analysis, including trend lines, moving averages, support and resistance, momentum, and more.	Strategic Considerations for Options Buyers² Discusses effective options trading and how to balance potential risks and rewards.	Introduction to Diversification and Portfolio Management¹ Discusses the importance of creating the right allocation for your portfolio, and the basic steps to build your portfolio over time.

<p>11:20 a.m.– 12:00 p.m.</p>	<p>Researching Stocks at E*TRADE¹ Demonstrates how to research profitability, growth, valuation, and analyze technical conditions such as trend, momentum, and sentiment, using analyst reports and quantitative research data.</p>	<p>Options Prices in the Real World² Explores the relationships between price, time, volatility, and liquidity in options markets.</p>	<p>Create Your Retirement Outlook at E*TRADE¹ Walks through E*TRADE's Retirement Planning Calculator and shows you how to determine whether you're on track to reach your retirement goals.</p>
<p>1:00– 2:00 p.m.</p>	<p>Creating Your Trading Plan² Explains elements of a systematic trading strategy: the goal, stake, risk, timing, tools, and tactics.</p>	<p>Options Trading at E*TRADE: Tools & Information¹ Demonstrates options chains, strategy analysis tools, idea screeners, and order functionality.</p>	<p>Investing for a More Tax-Efficient Retirement¹ Discusses how allocating investments across different account types and asset classes may add more tax-efficiency to your retirement income.</p>
<p>2:10– 3:10 p.m.</p>	<p>Finding and Selecting Stocks² Illustrates a systematic approach to assessing market conditions and finding potential stocks in which to invest. Discusses the role that company fundamentals and technical analysis can play, and why timeframe and risk tolerance should be considered.</p>	<p>Introduction to Options Spreads² Demonstrates the tradeoffs and outcomes in four spread types: bull call spreads, bull put spreads, bear call spreads, and bear put spreads.</p>	<p>Taking Advantage of Roth Accounts¹ Highlights the benefits and rules of Roth IRAs, Roth employer plans, and Roth conversions.</p>
<p>3:20– 4:20 p.m.</p>	<p>Entry, Exit, and Risk Management² Explains how to determine the size of your trade, identify entry and exit prices, and use basic and advanced order types to establish positions and manage risk.</p>	<p>Advanced Options Income with Iron Condors and Butterflies² Explains the underlying theory of iron condors and butterflies—and shows you how to implement and manage these positions.</p>	<p>Writing Covered Calls¹ Details the covered calls options strategy, and reviews E*TRADE's Covered Call Trading Guide, which lays out an easy, step-by-step checklist for making covered call trades.</p>
<p>4:30– 5:00 p.m.</p>	<p>Introducing E*TRADE Pro^{1,3} Demonstrates how to personalize E*TRADE's advanced trading platform, and the charts, market data, order management, and idea tools available.</p>		



Visit the E*TRADE [Education Day site](#) for registration details. All sessions are described in our [comprehensive PDF agenda](#).

Members of the media interested in joining should email MediaInq@etrade.com to inquire.

E*TRADE helps investors balance today's needs with tomorrow's goals, through pioneering digital tools coupled with guidance online and from financial consultants. To learn more about E*TRADE's trading and investing platforms and tools, visit etrade.com.

For useful insight from E*TRADE and third-party investment professionals, follow the Company on Twitter, [@ETRADE](#).

About E*TRADE Financial

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E*TRADE Financial Corporation and its affiliates do not provide tax advice, and you always should consult your own tax advisor regarding your personal circumstances before taking any action that may have tax consequences.

Please read the important disclosures below.

Important Note: Options transactions are complex and carry a high degree of risk. They are intended for sophisticated investors and are not suitable for everyone. For more information, please read the [Characteristics and Risks of Standardized Options](#) brochure before you begin trading.

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3. The E*TRADE Pro trading platform is available at no additional charge to customers who execute at least 30 stock or options trades during a calendar quarter or maintain a brokerage account balance of at least \$250,000.



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