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**E\*TRADE COMBATS PERPLEXITY ABOUT STOCK PLANS  
WITH TOP-TO-BOTTOM PARTICIPANT EXPERIENCE REDESIGN**

*New digital experience designed to help deliver greater clarity and understanding  
to an inherently complex benefit*

**NEW YORK, AUGUST 30, 2016** – E\*TRADE Financial Corporation (NASDAQ: ETFC) today announced the launch of its next generation online stock plan participant experience.

Stock grants may be a significant component of compensation packages for many. Yet despite using the equity received from grants to fund their retirement plan, or a number of life's biggest purchases, like a home or child's education, many plan participants continue to struggle with understanding core aspects of their benefits. In its most recent stock plan participant survey<sup>(1)</sup>, E\*TRADE Securities found that two out of five stock plan participants don't understand vesting, and two out of three don't understand the tax implications of their plan.

To help facilitate greater understanding and drive deeper appreciation for equity compensation, E\*TRADE worked through all participant touchpoints, conducting research among hundreds of plan participants to learn how each detail could be easier to understand, more transparent, and more engaging.

The result is a greatly enhanced experience, offering a simplified interface that provides clear insight and actionable steps to help plan participants with making informed decisions. The redesigned experience delivers essential plan information, tools, and resources to help participants get the most out of their stock plan account. Specifically, participants can:

- **Check the pulse of their account through a consolidated dashboard.** By visiting the all-new Overview tab, participants can quickly see account holdings, action items for review, and dates to remember, as well as understand the potential impact of stock price changes and future potential grants through the hypothetical account value calculator.
- **Interact with benefit details in new ways.** Participants can instantly see which grants are ready for acceptance, which are unvested, and/or which are exercisable, while now being able to pivot between holding type and status.
- **Take action with ease.** All plan participants—from the beginner to the experienced—can take action quickly. The intuitive new interface and self-help options enable participants to accept grants, sell shares, or exercise options with just a few clicks.

- **Gain insight and learn on demand.** The new Knowledge tab provides curated educational resources on stock plan basics, tax reporting, and planning for retirement, along with stock plan calculators to help work through the potential results of certain transactions.

“Education is paramount when it comes to equity compensation, because participants will only truly appreciate their plan benefits when they understand them,” said Paul Hutchison, SVP of E\*TRADE Financial Corporate Services, Inc. “Simplifying the stock plan experience, while at the same time working to engage and educate plan participants, were our central areas of focus. The redesign reflects our efforts to help demystify stock plan benefits and provide a best-in-class experience when coupled with our dedicated human support and onsite training<sup>(2)</sup>.”

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

(1) Source: March 2016 “E\*TRADE Corporate Services Annual Participant Survey” conducted by E\*TRADE Securities LLC

(2) Participant support and education, including onsite training, is provided by E\*TRADE Securities LLC

### **About E\*TRADE Financial**

The E\*TRADE Financial family of companies provides financial services that include trading, investing, banking and managing employee stock plans.

Employee stock plan solutions are offered by E\*TRADE Financial Corporate Services, Inc.

Securities products and services are offered by E\*TRADE Securities LLC, Member [FINRA/SIPC](#).

In connection with the stock plan solutions it offers, E\*TRADE Financial Corporate Services, Inc. utilizes the services of E\*TRADE Securities LLC to administer stock plan participant brokerage accounts.

E\*TRADE Financial Corporate Services, Inc. and E\*TRADE Securities LLC are separate but affiliated companies.

More information is available at [www.etrade.com](#).  
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