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**33rd ANNUAL E*TRADE CORPORATE SERVICES DIRECTIONS CONFERENCE REVEALS
INSIGHTS GATHERED FROM EQUITY COMPENSATION PROFESSIONALS**

650 attendees gathered in Palm Springs to explore the latest in stock plan administration trends and recent technological advancements

NEW YORK (BUSINESS WIRE), June 04, 2019—E*TRADE Financial Corporate Services, Inc. today announced insights gathered from its 33rd annual Directions conference held May 14 to 17. Based on qualitative feedback, equity compensation professionals are most focused on advancements that help automate or streamline traditionally manual processes:

- **API integrations:** Human resources professionals and plan administrators typically have to consult different platforms to synthesize participant data, but today APIs can synchronize disparate sources onto one platform. For example, administrators can now sync participant demographic data from Workday and Equity Edge Online® in real time.
- **Financial reporting enhancements:** Finance and accounting teams have long contended with numerous manual reports, but they are now turning to automated processes to help consolidate. For example, today E*TRADE clients can forecast multiple periods of expense for existing and hypothetical grants in a single report; they also have access to a deferred tax asset report that calculates tax accrual activity for options, awards, and units and can be tailored to multiple jurisdictions.
- **10b5-1 plan automation:** As equity compensation shifts from a benefit often reserved for executives to one that extends deeper into organizations, legal teams and administrators are seeing a rise in 10b5-1 plans that need to be set up and processed. In response, E*TRADE recently launched the industry's first online automated 10b5-1 trading plan solution, streamlining the plan's setup, approvals, maintenance, and reporting.

“Amid the growth and expansion of US multinational corporations’ granting strategies, equity compensation is a crucial subject among human resources professionals and business leaders,” said Scott Whatley, President of E*TRADE Financial Corporate Services, Inc. “As plan administrators navigate this landscape, it’s up to us to help make their experience—and those of their participants—easier and more seamless. The reality is there are more than a few analog

processes that are ripe to be automated. And while we've come a long way on that front these past few years, we will continue to work side-by-side with our clients to leverage technology in further raising the bar."

Directions is one of the nation's longest-running conference for stock plan professionals. Attendees gain insights into industry trends and best practices, plus opportunities to help optimize Equity Edge Online, E*TRADE Corporate Services' #1-rated stock plan administration platform.¹ Attendees participated in 40 hands-on labs, 32 workshops, 17 roundtables, and heard from keynote thought leaders including futurist Leonard Brody and decorated Paralympian Amy Purdy.

For news and thought leadership on equity compensation, follow E*TRADE Corporate Services, on [LinkedIn](#).

1. As of June 15, 2018, Group Five Stock Plan Administration Benchmark Study and Financial Reporting Benchmark Study rated Equity Edge Online® highest in Loyalty and Overall Satisfaction for the seventh consecutive year (2012–2018) among all plan sponsors who use a commercial system to manage the recordkeeping of their stock plans in-house. E*TRADE Financial Corporate Services, Inc. was also rated highest among partial administration plan sponsors in overall satisfaction for brokerage services in the same study, for the second consecutive year. Group Five, LLC is not affiliated with E*TRADE Financial Corporate Services, Inc. or the E*TRADE Financial family of companies.

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