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E*TRADE CORPORATE SERVICES ANNOUNCES AUTOMATION ENHANCEMENTS AND INDUSTRY-LEADING REPORTING FUNCTIONALITY FOR EQUITY EDGE ONLINE[®]

Award-winning stock plan administration platform enables administrators to offer greater customization and flexibility to deliver streamlined participant experience

NEW YORK, December 5, 2019 (BUSINESS WIRE)—E*TRADE Financial Corporate Services, Inc. today announced a series of reporting and automation enhancements to its award-winning¹ stock plan administration platform, Equity Edge Online (EEO).

- **Report bursting and file sharing functionality.** An industry first, this fully automated feature allows stock plan administrators to run certain participant reports and statements in EEO and then deliver them as customized PDFs to participants on *etrade.com*. Clients can save time and mailing costs, while participants can easily access grant and plan information.
- **Retirement Eligibility (RE) enhancements.** Administrators can customize RE for shares on a grant-by-grant basis for an unlimited number of eligibility dates, and RE taxation is integrated within EEO's existing taxation framework. The participant experience is also streamlined—their unvested shares are automatically withheld to help cover potential tax liabilities. In addition, participants have a clearer view of their retirement eligibility tax obligations through automatically generated confirmations on *etrade.com* that break down Medicare, Social Security, federal, and state taxes.
- **ESPP share withholding.** Administrators can now flag participants who will have a taxable event during their ESPP purchase. Administrators can withhold shares to cover the participant's tax obligations. Participants can alleviate the need to pay taxes with cash and limit the impact to their paycheck.

“Through our latest enhancements we’re equipping administrators with flexible, customizable solutions—enabling them to meet the needs of participants like never before,” said Scott Whatley, President of E*TRADE Corporate Services. “Stock plan administrators are constantly challenged to do more with less, so we are relentless in our pursuit to deliver an industry-leading platform that transforms manual and time-consuming processes into automated tasks. This way, administrators can spend more time delivering value-added services and boosting participant engagement.”



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About E*TRADE Financial and Important Notices

1. As of June 14, 2019, Group Five Stock Plan Administration Benchmark Study and Financial Reporting Benchmark Study rated Equity Edge Online® highest in Loyalty and Overall Satisfaction for the eighth consecutive year (2012–2019) 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 rated #1 in overall satisfaction for brokerage services (offered by E*TRADE Securities LLC) three years in a row in the same study. All other claims also included in the 2019 study. Group Five, LLC is not affiliated with E*TRADE Financial Corporate Services, Inc. or the E*TRADE Financial family of companies.

The E*TRADE Financial family of companies provides financial services, including 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). Commodity futures and options on futures products and services are offered by E*TRADE Futures LLC (Member NFA). Managed Account Solutions are offered through E*TRADE Capital Management, LLC, a Registered Investment Adviser. Bank products and services are offered by E*TRADE Bank, and RIA custody solutions are offered by E*TRADE Savings Bank, both of which are national federal savings banks (Members FDIC). More information is available at www.etrade.com.

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