

## FOR IMMEDIATE RELEASE

### **E\*TRADE Media Relations**

646-521-4418

[mediainq@etrade.com](mailto:mediainq@etrade.com)

### **E\*TRADE Investor Relations**

646-521-4406

[ir@etrade.com](mailto:ir@etrade.com)

## E\*TRADE TO HOST EDUCATION DAY IN DALLAS

*Complimentary education open to investors and traders of all experience levels*

**DALLAS, September 20, 2018** — E\*TRADE Financial Corporation (NASDAQ: ETFC) today announced it will host an Education Day at the [Four Seasons Las Colinas](#) in Dallas, Texas, on Saturday, September 29, 2018, from 8 a.m. to 5 p.m. The event offers a number of complimentary sessions for investors and traders interested in learning from financial professionals.

- Investors and traders can tailor their own experience from a selection of 19 specialized sessions.
- Financial Consultants from Dallas-area E\*TRADE branches, members of the E\*TRADE Trader Service Team, and Futures Specialists from E\*TRADE will be on-site all day to answer questions about investing, retirement planning, and derivatives and futures trading.
- E\*TRADE welcomes anyone to join, whether or not they are an E\*TRADE customer.

Sessions run concurrently across three tracks, along with an additional lunch-and-learn session dedicated to futures. Sessions range from investing and futures basics to advanced options strategies. Investors and traders can attend sessions across all tracks:

<b>Time (CT)</b>	<b>Trading Track</b>	<b>Options Track</b>	<b>Investing Track</b>
8:00–9:00 a.m.	<b>Breakfast and Registration</b>		
9:00–10:00 a.m.	<b>First Things First: Intro to the Stock Market</b> Learn how the market works and key factors you should know before you start trading.	<b>Getting Started with Options</b> Learn the basics of options trading and common terminology to help lay a foundation for the rest of this track.	<b>Building a Balanced Portfolio for Every Life Stage</b> Discover how to decide on an asset allocation for your financial situation using E*TRADE tools.
10:15–11:15 a.m.	<b>The Trend Is Your Friend: Using Stock Charts</b> Break down the basics so you can make the most of these powerful technical analysis techniques.	<b>Using Options for Speculation</b> Discover what to consider when using options as a substitute for stock.	<b>Achieving Diversification with Mutual Funds and ETFs</b> Learn how to build a diversified portfolio with these

			investments and the attributes of each.
11:30 a.m.–12:30 p.m.	<b>Opportunity Knocks: Finding Stock Ideas</b> Learn how to identify opportunities that match your outlook, goals, and risk tolerance	<b>Basic Income Strategies</b> Get started trading options with an introduction to two basic income strategies.	<b>Allocating for a More Tax-Efficient Retirement</b> Explore how allocating investments and asset classes may add more tax efficiency to your retirement income.
12:30–1:30 p.m.	<b>Lunch-and-Learn Session:</b>  <b>Volatility in Perspective</b> Learn about market volatility and why it picked up in early 2018.		
1:30–2:30 p.m.	<b>Strike: Opening Your Trade</b> Explore how to place a trade with E*TRADE and look at several profit-seeking strategies for bull markets, including buying the stock and trading call options.	<b>Using Spreads for Higher Probability Options Trades</b> Learn about spread trading with two basic strategies: bull call spreads and bear put spreads.	<b>Beyond Retirement: Beneficiary Planning and the Stretch IRA</b> Understand the impact a beneficiary choice can have on your retirement accounts, and how to streamline the process for your heirs.
2:45–3:45 p.m.	<b>Protect: Managing Your Trade</b> Learn how to use price charts to set profit targets and loss limits. We'll also explore managing trade risk.	<b>Iron Condors for Options Income</b> Learn about iron condors—an options strategy that offers an opportunity for premium income in a controlled-risk position.	<b>Paying Yourself in Retirement: Creating a Sustainable Withdrawal Plan</b> Explore portfolio withdrawal techniques to help combat inflation and market risk in retirement.
4:00–5:00 p.m.	<b>Complete: Exiting Your Trade</b> Explore strategies for selling your stock, how to use conditional orders to close a trade, and why you may consider trailing stops.	<b>Tools for Options Traders</b> See a demonstration of the core options trading tools from E*TRADE, along with a look at some of the more advanced tools.	<b>Protecting Investments with Options</b> Learn how options can be used to hedge risk with individual stock positions or an overall portfolio while trying to accomplish investment goals.

Visit the E\*TRADE [Education Day site](#) for registration details.

Members of the media interested in joining should email [MediaInq@etrade.com](mailto:MediaInq@etrade.com) to inquire.

E\*TRADE aims to enhance the financial independence of traders and investors through a powerful digital offering and professional guidance. To learn more about E\*TRADE's trading and investing platforms and tools, visit [etrade.com](http://etrade.com).

For useful trading and investing insights from E\*TRADE, follow the company on Twitter, [@ETRADE](#).

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

E\*TRADE Financial and its subsidiaries provide financial services including brokerage and banking products and services to retail customers. 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](http://www.etrade.com).

**Please read the important disclosures below.**

**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.**

***Important Note:*** Futures and 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](#) and the [Risk Disclosure Statement for Futures and Options](#) prior to applying for an account. View the [E\\*TRADE Futures LLC disclosure documents and other financial information](#). Moreover, there are specific risks associated with buying options, including the risk that the purchased options could expire worthless. Also, the specific risks associated with selling cash-secured puts include the risk that the underlying stock could be purchased at the exercise price when the current market value is less than the exercise price the put seller will receive. Moreover, there are specific risks associated with trading spreads, including substantial commissions, because it involves at least twice the number of contracts as a long or short position and because spreads are almost invariably closed out prior to expiration. Multi-leg options including collar strategies involve multiple commission charges. Because of the importance of tax considerations to all options transactions, the investor considering options should consult their tax advisor as to how taxes affect the outcome of each options strategy. Commissions and other costs may be a significant factor. An options investor may lose the entire amount of their investment in a relatively short period of time.

Diversification and asset allocation do not ensure profit or protect against loss in declining markets.

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