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**E\*TRADE LAUNCHES NEW PLANNING CENTER THAT HELPS PARTICIPANTS  
INTEGRATE THEIR STOCK PLAN BENEFITS INTO AN INVESTMENT PLAN**

*New Planning Center offers a holistic view of one's stock plan assets, combining education  
with a laser-focus on user experience*

NEW YORK--(BUSINESS WIRE)—E\*TRADE Financial Corporate Services, Inc. today announced the launch of a Planning Center that helps participants easily factor their stock plan benefits into the context of their overall financial strategy. The new, easy-to-understand digital dashboard offers a number of tools to help participants:

- Prepare for upcoming events related to their stock plan
- Understand the potential tax implications on their benefits before taking action
- Explore different ways to use proceeds to help meet their financial goals, such as buying a home, saving for retirement, or paying for college
- Consume educational content tailored to the stock plan awards they receive from their company, enabling them to take an investment opportunity and turn it into action

“Too often, stock plan participants see their equity compensation as a bonus to help meet short-term goals, and one that is distinct from their long-term financial wellness,” said Scott Whatley, President of E\*TRADE Corporate Services. “With the Planning Center, we aim to help participants learn how their stock plan benefits fit into their larger financial picture and how they can make a meaningful difference in achieving some of life’s biggest financial goals.”

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

**About E\*TRADE Financial and Important Notices**

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



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In connection with stock plan solutions offered by E\*TRADE Financial Corporate Services, Inc., E\*TRADE Securities LLC provides brokerage services to stock plan participants.

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