

## FOR IMMEDIATE RELEASE

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## **E\*TRADE UNVEILS ENHANCED & CUSTOMIZABLE DIGITAL EXPERIENCE FOR STOCK PLAN PARTICIPANTS**

*E\*TRADE Corporate Services enhanced its industry-leading participant experience to include a guided end-to-end journey with timely and actionable insights*

**ARLINGTON, Va., October 7, 2020**--(BUSINESS WIRE)—E\*TRADE Financial Corporate Services, Inc. today announced the release of visual and functional enhancements to its industry-leading<sup>1</sup> stock plan participant user experience.

As employee stock plan benefits grow in popularity, plan administrators and participants alike are seeking scalable digital solutions that help drive understanding, engagement—and, ultimately, satisfaction. With this need in mind, the new interface on *etrade.com* provides enhanced features for intuitive navigation and a tailored experience, allowing users to view complete awards at a glance, receive customized messages, and seamlessly track performance.

On the participant front:

- Sleek navigation and a new Overview page facilitate ease of use
- Dynamic display cards provide personalized information and actionable insights based on the participant's award type and lifecycle, for a guided experience
- Important holdings information is elevated on the page to highlight plan essentials—including a redesigned performance chart and grants organized by equity type and status
- Enhanced education and guidance included for important topics like tax considerations, vesting, and possibilities for shares and proceeds

On the administrator front:

- A *lifetime stats* feature quickly reveals totals of all grants received by individual participants in Equity Edge Online<sup>®</sup>, reinforcing the value of stock plan benefits
- Stock plan education resources, including key topics like tax implications, redesigned for added clarity—ultimately freeing up time for administrators and helping increase efficiency

“Participant engagement and satisfaction are key to a successful equity compensation plan. As these benefits become accessible to broader employee populations, administrators must find new and creative ways to engage participants and make the most out of their plans,” said Scott

Whatley, President of E\*TRADE Financial Corporate Services, Inc. “While these have always been our focus, we strive to continually raise the bar—which is our goal with these site enhancements. The new user experience delivers an engaging and guided environment for participants, while packing the punch of industry-leading<sup>1</sup> features and functions administrators seek.”

Visit [www.etrade.com/corporateservices](http://www.etrade.com/corporateservices) to learn more about our award-winning platform.

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

1. As of June 19, 2020, Group Five Stock Plan Administration Benchmark Study and Financial Reporting Benchmark Study rated Equity Edge Online<sup>®</sup> highest in Loyalty and Overall Satisfaction for the ninth consecutive year (2012-2020) 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 full administration plan sponsors in loyalty and overall satisfaction with administration platform in the same study. Group Five, LLC is not affiliated with E\*TRADE Financial Corporate Services, Inc. or the E\*TRADE Financial family of companies

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

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, a Federal savings bank, Member FDIC, or its subsidiaries. More information is available at [www.etrade.com](http://www.etrade.com).

**E\*TRADE Financial, LLC 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.**

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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