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**IN TIME FOR TAX SEASON, E*TRADE LAUNCHES TAX PLANNING INTERFACE
FOR STOCK PLAN PARTICIPANTS**

Also launches new cash plan module on Equity Edge Online®

NEW YORK, MARCH 29, 2018 – E*TRADE Financial Corporate Services, Inc. today announced a new tax planning interface on *etrade.com*'s stock plan participant pages, as well as a new cash plan module on the award-winning¹ Equity Edge Online® (EEO) platform.

To help facilitate greater understanding of the potential tax implications of equity compensation, E*TRADE Securities has made several enhancements to its *etrade.com* participant platform. Stock plan participants now have access to an array of new tax-related features, including:

- An easy-to-understand roadmap of steps a participant can take to gather tax information
- A new Stock Plan Transactions Supplemental Information guide, detailing tax information related to stock plan transactions for the calendar year
- A single online and mobile app view of cash plan awards consolidated with other equity benefits²
- Notifications of available tax documents related to their stock plan benefits
- Clear prompts to the E*TRADE Tax Center
- A series of virtual education sessions open to all participants to provide a greater understanding of potential tax implications for stock plan transactions

On Equity Edge Online, stock plan administrators can now access a full suite of cash plan features that make it easier than ever to administer, manage, and account for cash grants. Key features of the new module include:

- Comprehensive cash plan management, including time-based vesting, performance tracking, custom termination and cancellation rules, and new import/export capabilities
- New expense reports for cash plans
- Cash award payout confirmations for stock plan participants

“Stock plan benefits are inherently complex instruments, and many participants can find themselves overwhelmed when preparing for tax season, which is a complicated process in itself,” said Scott Whatley, President of E*TRADE Financial Corporate Services. “With this in mind, we’re thrilled to add a bit more clarity for the participants we serve. And on the administrator side, we’re equally pleased to add more firepower to our cash plan offering, to provide a more comprehensive yet intuitive module. Both of these enhancements deliver on our

charge to raise the bar for the industry, and redefine what's possible in the stock plan administration space.”

For useful insight from E*TRADE Financial Corporation and third-party investment professionals, follow the company on Twitter, [@ETRADE](#).

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.

1. As of June 30, 2017, Group Five Stock Plan Administration Benchmark Study and Financial Reporting Benchmark Study rated Equity Edge Online® highest in Loyalty and Overall Satisfaction for the sixth consecutive year (2012–2017) among all plan sponsors who use a commercial system to manage the recordkeeping of their stock plans in-house.
2. Cash Plan administration does not include the disbursement of cash to participants by E*TRADE Corporate Services or its affiliates. Activation of the cash grants functionality is available for an additional fee.

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.

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.

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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