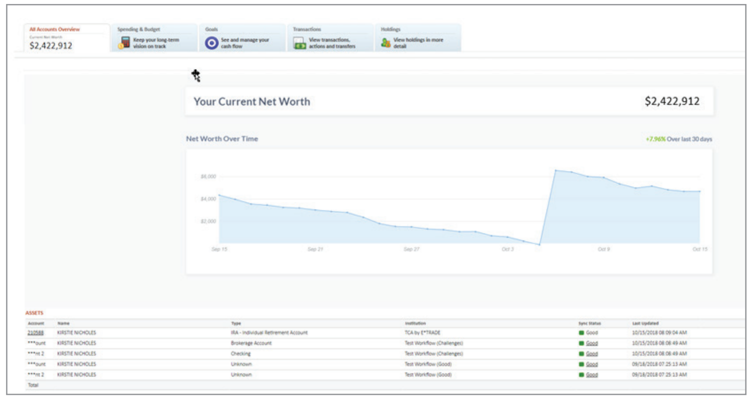
CompleteView

An account aggregation tool that helps solidify your position at the center of your clients' wealth management teams

To be at the center of your clients' wealth management teams, you need to provide holistic planning guidance. To do that effectively, you need a comprehensive view of all your clients' assets and liabilities. That's why account aggregation can be such a valuable tool.



CompleteView screen in Liberty. For illustration only.

CompleteView is an innovative account aggregation feature built right into Liberty that helps you:

- Enhance the quality of your client support
- Provide better guidance and decision-making
- Streamline back-office operations by seamlessly gathering outside account information
- Gather new assets that are currently held-away
- Spot opportunities to provide additional products or services

CompleteView is designed to provide easy access to view your clients' overall financial picture so you can provide more comprehensive guidance and advice targeted to their specific needs. CompleteView can help you assemble a comprehensive and up-to-date picture of a client's total assets, liabilities, net worth, spending habits, and goals.

CompleteView is:

- **Fully integrated.** CompleteView is built right into the Liberty platform, helping you avoid any extra work, frustration, and the extra cost of evaluating, purchasing, and integrating an add-on aggregation tool. The aggregated views in Liberty can be viewed online or built into reports.
- **Extensively linked.** CompleteView provides data links to more than 14,000 institutions, from checking and savings accounts to credit cards to 401(k)s and life insurance companies. Clients can add several different types of accounts, including but not limited to checking and savings accounts from banks, credit unions, and other financial institutions, retirement accounts like 401(k) plans, credit cards, mortgages, loans, and annuities.
- **Easy to use.** You can establish bulk uploads into the tool for all accounts you manage on behalf of clients at other institutions, helping to eliminate the need for clients to link those accounts themselves. Clients can then round out their complete view by linking accounts quickly and easily in the system simply by entering their account log-ins.

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- **Timely.** The data in CompleteView relating to E*TRADE Advisor Services accounts is real-time. This data can easily be refreshed during a business day by re-synching. Data from other accounts are typically updated overnight.
- **Cost effective.** The Liberty platform has the account aggregation feature built in at no extra cost for E*TRADE Advisor Services account holders.

CompleteView includes personal financial management apps that can help drive client engagement and facilitate additional analyses. These apps complement the aggregated account view, providing clients with the ability to track goals and spending.

To learn more about CompleteView, contact your Relationship Manager at 800-955-7808 or email: advisorservices@etrade.com.

E*TRADE ADVISOR SERVICES