Press Release

FOR IMMEDIATE RELEASE

E*TRADE Media Relations
646-521-4418
mediainq@etrade.com

TCA BY E*TRADE LAUNCHES A NEW ACCOUNT AGGREGATION TOOL FOR ADVISORS

CompleteView gathers and streamlines accounts, giving advisors a holistic view of client assets

DENVER, November 27, 2018 — TCA by E*TRADE, a provider of integrated technology, custody, and practice management support for Registered Investment Advisors (RIAs), today announced the launch of its account aggregation tool, CompleteView. The tool gathers data from across a client's financial accounts, including custodial accounts, helping advisors enhance their practice by providing a comprehensive view of client assets.

CompleteView is accessible through the Liberty platform, TCA by E*TRADE's advanced digital custody platform, which offers advisors and their clients access to on-demand financial information through a single online interface. Available for no additional cost to advisors, CompleteView delivers deep insights into a client's financial picture, helping advisors give guidance tailored to their clients'needs. These clients can also easily monitor their own account to help them make informed financial decisions.

"By combining account aggregation capabilities and portfolio modeling or financial planning tools, advisors are not only offering a value-added service—they also can have more meaningful conversations with their clients," said TCA by E*TRADE president Joshua Pace. "CompleteView helps advisors analyze spending and investment patterns over time, providing important insights into their clients' saving and investing trends. This can help advisors spot opportunities to provide additional solutions to help support their clients' financial needs."

The key features offered by CompleteView include:

- **Robust integration:** Clients can easily connect their outside accounts, including checking accounts, credit cards, 401(k)s, and more, with access to more than 14,000 financial institutions through the Liberty platform.
- **Comprehensive reporting:** Advisors have a collective view of a client's financial data, which can be viewed through an online portal and easily exported for reporting.
- **Enhanced client engagement:** Clients are empowered to track their goals, assess spending patterns, and monitor their net worth.

Press Release

The fully integrated account aggregation tool helps streamline back-office operations by removing the need to gather and track outside account information. In turn, this gives advisors more time to spend with their clients and foster deeper relationships.

“We’re always on the lookout for resources that can eliminate manual work and help us focus on our primary business priorities. Even today, we gather data with pencil and paper by asking our clients for information when we meet,” said Reservoir Financial president Liz Charron**.** “CompleteView will allow us to look at a client’s entire financial picture in a more automated and streamlined way—helping us to focus on building client relationships and serving client interests.”

For more information about TCA by E*TRADE and or the account aggregation tool, please call 800-955-7808 or email learnmore@trustamerica.com.

About TCA by E*TRADE and Important Notices

E*TRADE Savings Bank, doing business as “TCA by E*TRADE” and its affiliates (“E*TRADE”) do not warrant these products, services, and publications against different interpretations or subsequent changes of laws, regulations, and rulings. E*TRADE does not provide legal, accounting, or tax advice. No information presented constitutes a recommendation by E*TRADE Savings Bank or its affiliates to buy, sell, or hold any security, financial product, or instrument discussed therein or to engage in any specific investment strategy.

TCA by E*TRADE is a champion of Registered Investment Advisors, dedicated to helping them realize their full potential. TCA by E*TRADE is an RIA custodian offering integrated real-time technology, consultative services, and back office support custom-built for RIAs. TCA by E*TRADE works with advisors to provide them the technology and support they need to manage their practices and their clients’ financial futures. Learn more at www.trustamerica.com.

RIA custody solutions are offered by E*TRADE Savings Bank, which is a national federal savings bank (Member FDIC).

E*TRADE Savings Bank, doing business as “TCA by E*TRADE”: 7103 South Revere Parkway, Centennial, CO 80112. Member FDIC.