

Activating your E*TRADE stock plan account



Please follow the steps below to activate your account

Step 1: Access the website at: www.etrade.com/activate or follow the link in the activation email you received from E*TRADE.

- Company name / ticker symbol: (Example: ETFC)
- Enter your Social Security number or employee ID
- Enter the code from your activation email or click on 'Request a new code', then select to have it sent by email

Once you have the authentication code from your email, insert it in the box and begin answering the questions to set up your account.

The following pages provide additional details on the E*TRADE account activation process and the information you may be asked to provide.

Enter your information

Choose your language: English

1 VERIFY & START YOUR APPLICATION 2 PERSONAL INFORMATION 3 ACCOUNT PREFERENCES 4 CONFIRM & SUBMIT

What is your Residence Status ?

U.S. Citizen

U.S. Resident Alien

Neither U.S. Citizen nor U.S. Resident Alien

Country of Legal Residence:

Select Country

Choose your Account Registration Type

Individual account

Joint account

Would you like to use a new or existing log-on ID ?

I would like to create a new log-on ID.

I would like to use my existing log-on ID.

We'll use your existing account information to pre-fill your application and link your new and existing accounts.

User ID

Password

Forgot username / password?

Save & Continue

Why do we ask for Residence Status?
We need to know your residence status for taxation purposes. If you are not a U.S. citizen or resident alien, you may need to certify your foreign status for U.S. tax withholding. If this applies in your situation, we will provide easy instructions once your account is activated.

Step 3: The Personal Information page asks for details about residency, employment and additional account holders by providing the following information:

- Home address and phone number
- Social Security number and marital status
- Employment information
- Joint account information (if applicable)
- Additional profile details

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Cash Management Features
E*TRADE has options to help you manage the uninvested cash in your account. You can change these choices after your account is opened.

Manage your uninvested cash

E*TRADE offers several ways to manage the uninvested cash in your account. You can elect to automatically transfer cash to a bank sweep deposit program or other sweep account option (collectively, "Sweep Program").

To confirm your selection, choose from the following options and click 'Save & Continue' at the bottom of the page. Please note that the products available under the Sweep Program are subject to change at any time.

JP Morgan US Government Money Market Fund, E*TRADE Class

E*TRADE Financial Extended Insurance Sweep Deposit Account

JPMorgan 100% U.S. Treasury Fund, Morgan Class Shares

Cash Balance Program

Compare Choices and view the general terms and conditions of the products available.

Access Your Money
To make use of these services, you'll need to have at least \$1,000 available in cash within 90 days of activating your account.

E*TRADE Complete™ Debit Card
Access cash in your account with a free debit/ATM card.

E*TRADE Checkbook
Free checkbook allows you to write checks from your account.

Going Paperless
Your account will be set up to receive the following account documents electronically:
Statements, Trade Confirmations, Corporate Reports, Proxies, Reorganization Notifications, Prospectuses, and Tax Documents
Online document delivery helps you avoid a paper statement fee, eliminates paper waste, allows for easy access and management of information.

No thanks, I would like to receive my documents by mail.

Step 2: Begin the process with the Verify & Start Your Application page by providing the following information:

- Citizenship and Residency status
- Account type (individual or joint)
- Logon information

Choose your language: English

1 VERIFY & START YOUR APPLICATION 2 PERSONAL INFORMATION 3 ACCOUNT PREFERENCES 4 CONFIRM & SUBMIT

Primary Account Holder Home Address

United States

2937 N SACRAMENTO AVE

Permanent Street Address, Line 2

TITUSVILLE

Florida Zip

My mailing address is different from my permanent address.
A mailing address is an address other than your street address, such as a P.O. Box, where any mail should be sent.

Primary Account Holder Phone Number

United States +1 Area Code Phone number

Home

Click here to have the E*TRADE mobile app sent to your phone.

Primary Account Holder Tax Information

Social Security Number

Check this box if you don't have a Social Security Number.

Date of Birth MMDDYYYY

Marital Status

Step 4: The Account Preferences page asks how you would like to manage cash and receive activity statements by providing the following information:

- Cash management details
- Debit card and checkbook selection
- Paperless option for important documents

You're Almost Done!
Please review your application information below. You can also edit your information here as needed. Once you confirm your information, click the "Submit Application" button.

Account Details

Residence Status: U.S. Citizen	Country of Legal Residence: United States	Account Registration Type: Individual
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Primary Account Holder Personal Information Edit

Name: John Doe	Tax ID Number: XX-XXXX9999	Occupation: Research
Permanent Address: 2937 N SACRAMENTO AVE TULSAVILLE Florida 32781 United States <small>The mailing address is same as the permanent address.</small>	Date of Birth: 04/18/1978	Employer Name: Company
Email Address:	Marital Status: Single	Employer Address: 123 Main Street Tulsa Florida 32781 United States
Phone Numbers: Home Phone +1-770-852-1854	Number of Dependents: 1	Have you been notified by the IRS of backup withholding? No

The Primary Account Holder :

- Is not employed by a registered broker-dealer, a securities exchange, or FINRA.
- Is not a Director or policymaker of a publicly-owned company.
- Is not a 10% shareholder of a publicly-owned company.

Step 5: You're almost done! The Confirm and Submit page shows details of the information you entered. Review the following information and confirm to complete the activation process:

- Account details
- Primary account holder personal information
- Investment profile
- Account preferences and paperless options
- Stock plan account agreement

Setup complete! Your account is now set up and ready to use. Click the 'Log On & Complete' button to get started.

Congratulations! Your account is now set up.

Your Account Name and Number are: 12345678

What to do next?

Log on to your account with the username and password you selected

Upon log on you will immediately be prompted to complete your Tax Certification to avoid U.S. backup withholding

Once your Tax Certification is complete, you will be able to make online transactions within 24 hours

Certify your tax status now Log On & Complete

[Suggestions >>](#)

Any questions?

Contact us at 800-838-0908 24 hours a day, weekdays (from outside the US, visit etrade.com/contact for your country's toll-free number).

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