Your clients with E*TRADE will receive our new Privacy Notice

Updated Privacy Notice to be mailed to clients

As of October 2, 2020, E*TRADE joined forces with Morgan Stanley, a leading wealth management and investment banking firm. As a result of this transaction, we've updated our Consumer Privacy Notice that was sent in the first quarter of 2020 and titled the E*TRADE Privacy Statement/E*TRADE Consumer Privacy Notice to include Morgan Stanley as an affiliate and to permit the inter-affiliate sharing of creditworthiness data for everyday business purposes.

You should know:

- Essentially, the only changes in the Privacy Notice are to include Morgan Stanley as an affiliate and to permit the sharing of creditworthiness data.
- The Privacy Notice includes all of E*TRADE's business units and not just E*TRADE Advisor Services as reflected in the previous versions.
- Your existing service agreement still provides for confidentiality protection for your business and clients.

E*TRADE Advisor Services is required to provide your clients who have E*TRADE accounts an updated Privacy Notice, as federal law requires us to tell investors how we collect, share, and protect their personal information, as well as how they can opt out of certain types of sharing. Clients will receive a physical mailing with the updated privacy policy information in the mail beginning next week.

To view the privacy update, visit etrade.com/consumerprivacynotice. To view a copy of the communication we will be sending your clients, visit our privacy policy announcement.

If you have any questions or concerns, please contact your Client Service Advocate, or call 800-955-7808.

Sincerely,
E*TRADE Advisor Services

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E*TRADE ADVISOR SERVICES

The E*TRADE Financial Corporation family of companies provides financial services, including trading, investing, investment advisory, RIA custody and banking products and services.