

If you are having trouble reading this email, [read the online version](#).



---

## *An exciting new era begins*

---

Dear Valued Client,

As you may know, we announced in February that E\*TRADE would soon be merging with Morgan Stanley, one of the world's most respected wealth management and investment banking firms. Effective today, our two great companies have officially joined forces. We are excited to share some additional information with you.

**First and foremost, there's nothing you need to do and your experience with us remains the same.** Clients like you are our top priority. We are fully committed to preserving the RIA custodial platform you rely on and delivering the high level of service you've come to expect—without interruption—from your Client Service Advocate and our support teams.

Our goal is simple: To continuously improve the value we deliver to you.

To learn more, see our Advisor Services FAQs at: [us.etrade.com//morganstanley/advisorservices](https://us.etrade.com//morganstanley/advisorservices). And if you have questions, don't hesitate to reach out to your Client Service Advocate at any time.

Thank you for your partnership and continued trust. We look forward to continuing to deliver an end-to-end RIA experience that not only meets but exceeds your expectations.

Sincerely,

A handwritten signature in black ink that reads "Matt Wilson". The signature is written in a cursive, flowing style.

Matt Wilson  
President  
E\*TRADE Advisor Services

---

Visit us online: [etrade.com/AdvisorServices](https://etrade.com/AdvisorServices)

Contact us, or call 800-955-7808

Connect with us:



## About E\*TRADE Advisor Services

E\*TRADE Advisor Services is a next-generation advisor custodian focused on helping you manage client accounts efficiently and grow your business. We're committed to delivering tools, technology, and personalized support that puts you and your clients first.

To unsubscribe from future emails or to update email preferences, [click here](#)

**Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.**

E\*TRADE and E\*TRADE Advisor Services are registered trademarks or trademarks of E\*TRADE Financial Corporation. All other trademarks mentioned herein are the property of their respective owners. Product and service offerings are subject to change without notice.

E\*TRADE Savings Bank 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. Always consult your own legal, accounting, and tax advisors.

© 2020 E\*TRADE Savings Bank, doing business as "E\*TRADE Advisor Services." Member FDIC. All rights reserved.

7103 S Revere Parkway, Centennial, CO 80112

800-955-7808

[Privacy Statement](#)