



Activating Your E*TRADE Stock Plan Account

Overview

This guide is for US participants. Please follow the steps below to activate your stock plan account.

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

- Company name / ticker symbol (Example: MS)
- 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

The screenshot shows the E*TRADE activation page for a Stock Plan Account. The page is titled "Let's set up your stock plan account" and "Get started by confirming your identity." It includes a progress bar with four steps: 1. VERIFY & START YOUR APPLICATION (active), 2. PERSONAL INFORMATION, 3. ACCOUNT PREFERENCES, and 4. CONFIRM & SUBMIT. The form asks for the company name/ticker, Social Security Number (or Employee ID), and an authentication code. A "CONTINUE" button is at the bottom. A sidebar on the right lists the "Application Steps" in detail.

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

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)
- Log on information

The screenshot shows the E*TRADE activation page for a Stock Plan Account, Step 2: Personal Information. The page asks for "What is your Residence Status?" with radio button options for "U.S. Citizen", "U.S. Resident Alien", and "Neither U.S. Citizen nor U.S. Resident Alien". It also includes dropdown menus for "Country of Legal Residence", "Country of Citizenship", "Country of Dual Citizenship (if applicable)", "Country of Issuance", and "Choose your Account Registration Type" (with "Individual account" selected). A "Why do we ask for Residence Status?" sidebar explains the need for this information for tax purposes.

3a. 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

3b. Answer this question to the best of your ability.

NOTE: The first question will only apply to you if you are employed with a US FINRA regulated broker-dealer.

If you have any questions if this applies to you, check for your employer on this list: <https://www.finra.org/about/firms-we-regulate>

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 documents
- Paperless option for important documents

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

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

NOTE: If your screen differs from this, we may need additional documentation from you. Follow the prompts on the screen to take action.

Have 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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