



**E\*TRADE**  
ADVISOR SERVICES

## Introducing CompleteView!



You'll see this new feature when you log on to Liberty. Accept E\*TRADE's new Terms and Conditions and start adding accounts today!

*CompleteView aggregation reporting services can incorporate all of your investment assets, including those investment assets that are not part of the assets managed by CMG (the "Excluded Assets"). You and/or your other advisors that maintain trading authority, and not CMG, shall be exclusively responsible for the investment performance of the Excluded Assets. CMG does not maintain any trading authority for Excluded Assets. Rather, you and/or your designated other investment professionals maintain supervision, monitoring and trading authority for the Excluded Assets. You are under absolutely no obligation to utilize CompleteView.*

### COMPLETE PICTURE

Get a complete view of all your finances in one place.

### FINANCIAL INSIGHT

See where you stand. Link your accounts for a real-time view of your total financial picture.

### CONVENIENCE

Easily monitor your accounts through a single online interface.

### EASIER RECORDKEEPING

See your net worth. Avoid having to review multiple statements for a full outlook of where you stand.

### BUDGETING & GOAL SETTING

Set spending and saving goals. CompleteView includes several personal financial management features.

### INFORMATION SECURITY

As part of E\*TRADE's commitment to information and network security, CompleteView utilizes state-of-the-art encryption for data transmissions to keep account information confidential and secure.

- E\*TRADE Advisor Services recently introduced a new, robust account feature called CompleteView.
- CompleteView is an aggregation tool that allows you to link accounts from more than 14,000 institutions.
- CompleteView consolidates your financial data to provide you with a holistic, easily viewed perspective through E\*TRADE's Liberty platform.
- By linking your outside accounts to CompleteView, you can easily review your accounts and better understand your overall financial situation.
- The Liberty platform includes CompleteView at no additional cost to you.