

# Activating Your Morgan Stanley at Work Stock Plan Account

## Overview

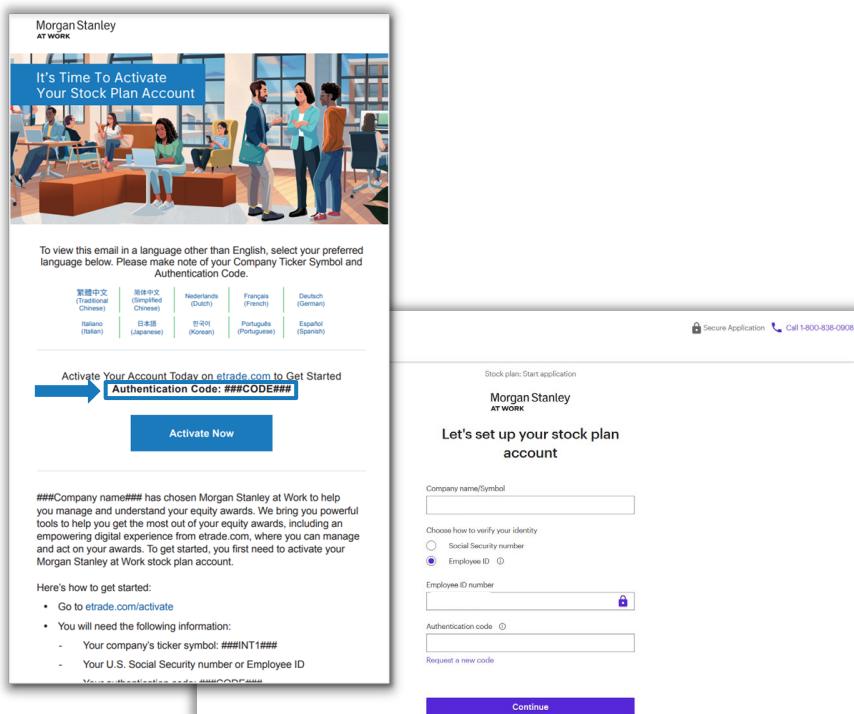
This guide is for U.S. participants. Please follow the steps below to activate your stock plan account.

### 1. Start Application

Access the website [here](#) or follow the link in the activation email you received from Morgan Stanley at Work. You'll be asked to fill out the following information:

- Company name / ticker symbol  
(Example: MS)
- Your social security number or employee ID
- The code from your activation email  
(or click on “[Request a new code](#)”)

**NOTE:** The ticker is the abbreviated name of your company's shares on a public stock exchange. If you work for a private company, check your activation email for what to enter here.

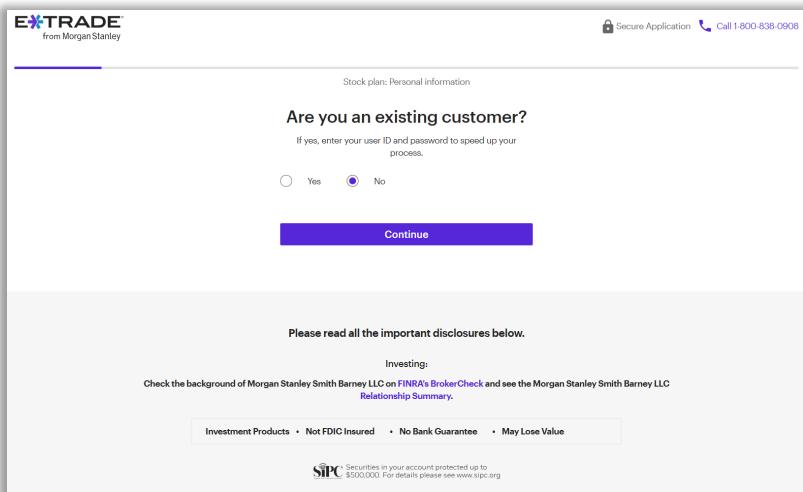


The image contains two screenshots of the Morgan Stanley at Work activation process. The top screenshot shows a landing page with a 'Activate Now' button and language selection options. The bottom screenshot shows a form for entering personal information like company name, employee ID, and authentication code.

### 2. Personal Information

Begin the process with selecting whether you are an existing customer.

- If you click “[Yes](#),” you will be prompted to log in, and your personal information on the following page will be pre-filled based on your latest E\*TRADE account profile.
- If you click “[No](#),” you will need to fill out your personal information, and then you will be prompted to create a username and password later on in the process.



The image shows a screenshot of the E\*TRADE activation process. It asks if the user is an existing customer and provides a 'Yes' or 'No' radio button. It also includes a disclosure section and a footer with investment product information and SIPC logo.

## Personal Information (cont'd)

You'll be asked to verify or fill out the following:

- Home address, phone number, and email
- Citizenship status
- Social Security number and date of birth
- Employment information
- Additional profile details

## 3. Account Setup

The Account Setup portion has questions we're required to ask by law. You will also be asked to fill out an investment profile to help us give you a more personalized experience.

**NOTE:** Please read the Regulatory questions carefully as certain responses may require additional documentation and delay the opening of your account. The first regulatory question will only apply if you or your spouse or a household member are employed with a U.S. FINRA regulated broker-dealer.

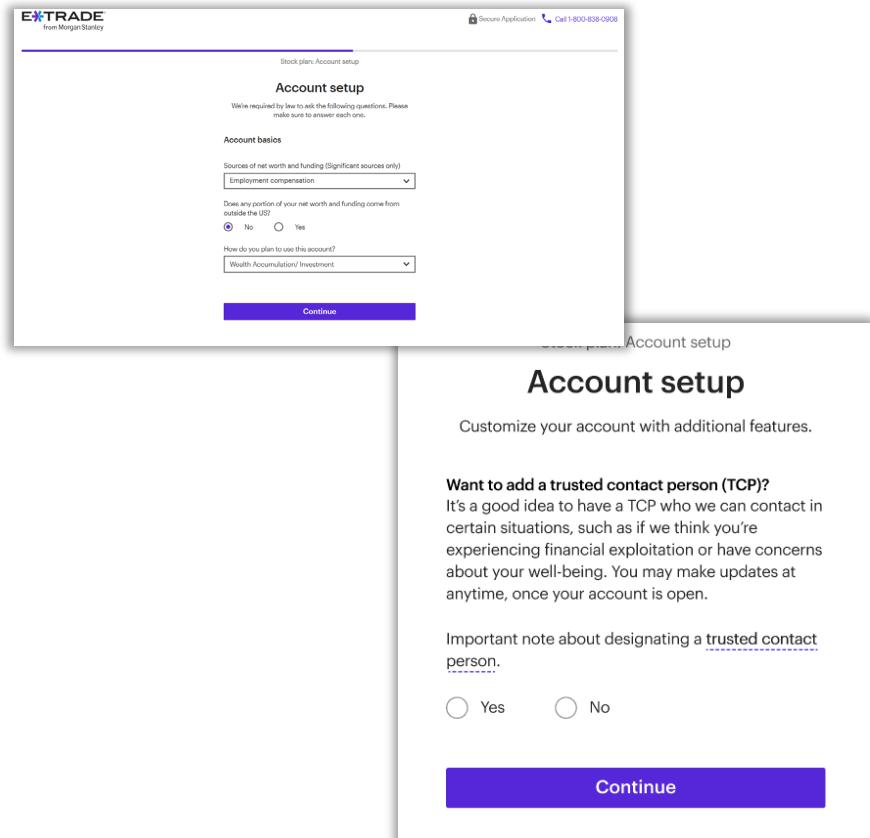
If you are unsure if this applies to you, check for your employer on this list:

<https://www.finra.org/about/firms-we-regulate>

## Account Setup (cont'd)

You'll also be asked to fill out some account basics and add a trusted contact (optional).

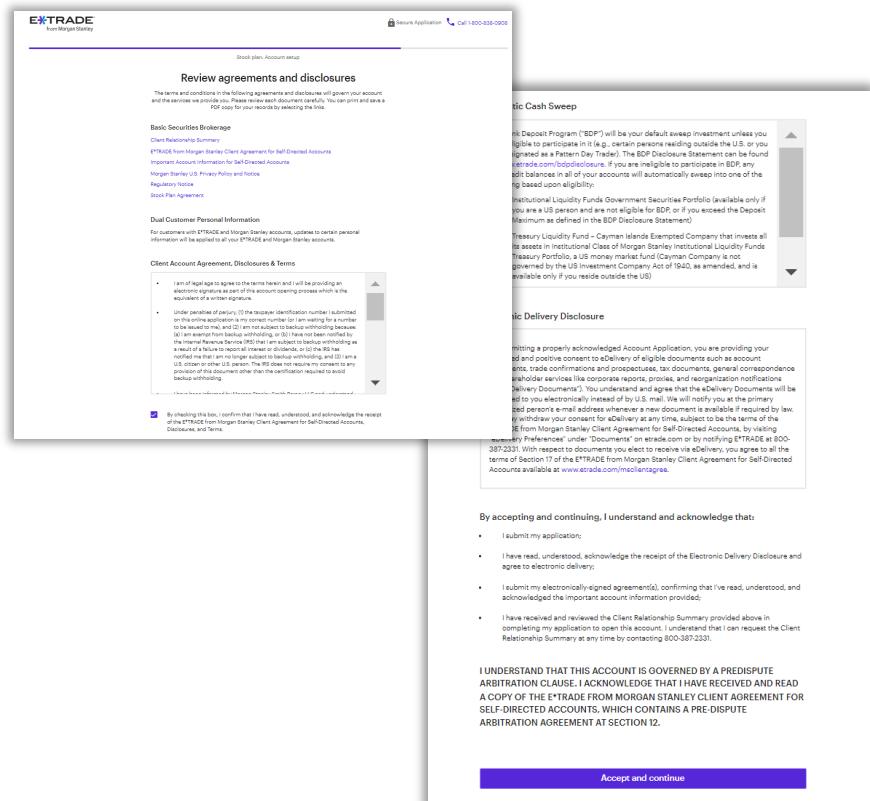
**NOTE:** A trusted contact is someone we can contact if we are unable to reach you to discuss urgent account activity. We may also ask this person to confirm your contact information, health status or contact information for other authorized users on your account. A trusted contact is not able to transact on your account unless they are also an authorized user on your account.



## Account Setup: Agreements and Disclosures

The last part of your account setup is to review and agree to the terms and conditions of your new stock plan account. Once you've looked over the agreements and disclosures, **check the box** to confirm, then click on **"Accept and continue."**

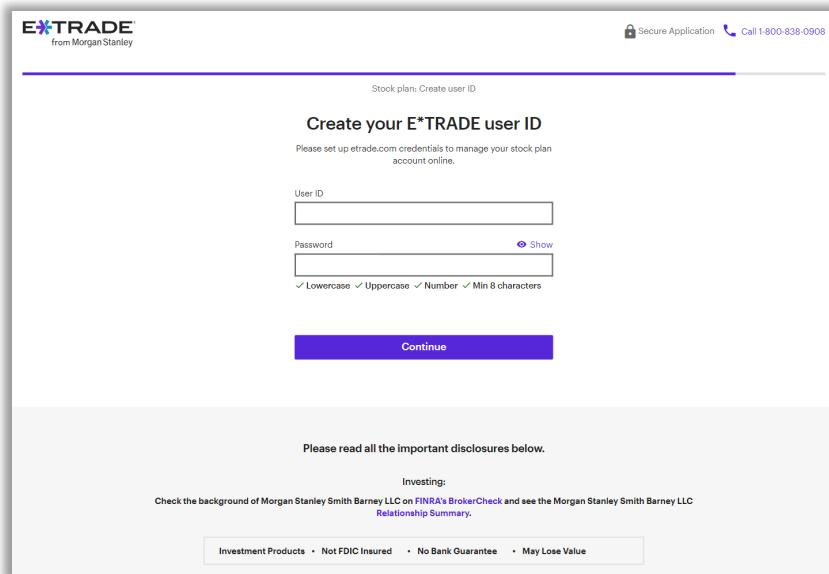
**NOTE:** You will be automatically opted in to eDelivery for all eligible account documents. Once your account has been setup, you can change your preferences under "Documents" on etrade.com and clicking on "eDelivery Preferences".



## 4. User ID

You're almost done! Create a user ID and password, then click "[Continue](#)."

**NOTE:** This step will only be shown if you are a new E\*TRADE user. If you have an existing E\*TRADE user ID, you will not see this step.

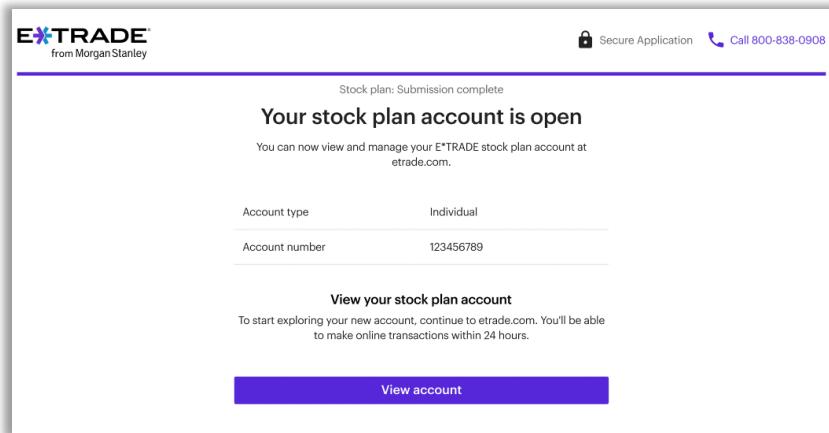


The screenshot shows the E\*TRADE user ID creation page. At the top, the E\*TRADE logo is visible, along with a "Secure Application" link and a phone number. Below the logo, the text "Stock plan: Create user ID" is displayed. The main heading "Create your E\*TRADE user ID" is centered. A sub-instruction "Please set up etrade.com credentials to manage your stock plan account online." is present. The user ID and password fields are labeled "User ID" and "Password" respectively. A "Show" link is next to the password field. Below the fields, validation text "✓ Lowercase ✓ Uppercase ✓ Number ✓ Min 8 characters" is shown. A large blue "Continue" button is at the bottom. A note at the bottom of the page says "Please read all the important disclosures below." and includes a "Investing" section with a link to Morgan Stanley's BrokerCheck and Relationship Summary. A disclaimer at the bottom states "Investment Products • Not FDIC Insured • No Bank Guarantee • May Lose Value".

## 5. Submission Complete!

Your account is now set up and ready to use. Click the "[View account](#)" button to get started.

**NOTE:** If we are unable to successfully open your account at this step, please follow the prompts on the screen to take action. We may need additional documentation from you.



The screenshot shows the E\*TRADE account submission confirmation page. The E\*TRADE logo is at the top, followed by a "Secure Application" link and a phone number. The text "Stock plan: Submission complete" is displayed. The main heading "Your stock plan account is open" is centered. Below it, the text "You can now view and manage your E\*TRADE stock plan account at etrade.com." is shown. A table displays account details: "Account type" is "Individual" and "Account number" is "123456789". A "View your stock plan account" link is present, with a note below it stating "To start exploring your new account, continue to etrade.com. You'll be able to make online transactions within 24 hours." A large blue "View account" button is at the bottom.

## Have Questions?

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

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Morgan Stanley at Work stock plan accounts were previously referred to as Shareworks, StockPlan Connect or E\*TRADE stock plan accounts, as applicable.

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