

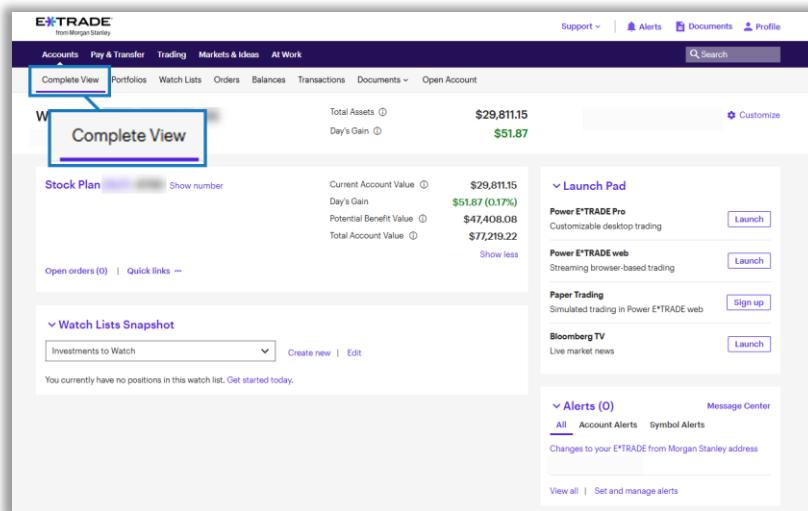
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Navigating Your Morgan Stanley at Work Stock Plan Account on etrade.com

(For Participants Outside the U.S.)

Overview

No matter what type of equity you have, your E*TRADE from Morgan Stanley stock plan account will be set up the same way. Follow the guide below to learn how to view and manage your stock plan benefits.



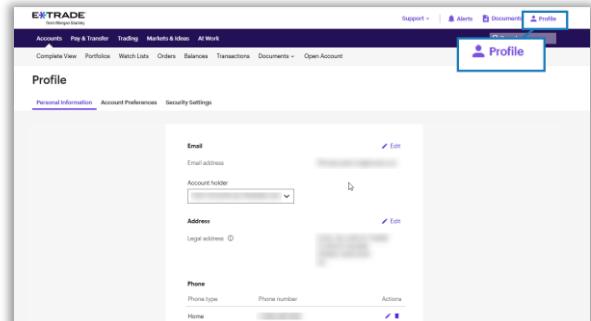
The screenshot shows the etrade.com homepage with the 'Complete View' tab highlighted. The main content area displays a summary of assets: Total Assets (\$29,811.15), Day's Gain (\$51.87, 0.17%), Current Account Value (\$29,811.15), Day's Gain (\$51.87, 0.17%), Potential Benefit Value (\$47,408.08), and Total Account Value (\$77,219.22). Below this, there are sections for 'Watch Lists Snapshot' (Investments to Watch, Create new, Edit) and 'Alerts (0)' (All, Account Alerts, Symbol Alerts, Changes to your E*TRADE from Morgan Stanley address). A 'Launch Pad' sidebar on the right offers links to Power E*TRADE Pro, Power E*TRADE web, Paper Trading, and Bloomberg TV.

When you first log into your account on [etrade.com](#), you'll see your stock plan account in the **Complete View** page along with any other accounts you may have with E*TRADE. This is where you will see a summary of your accounts.

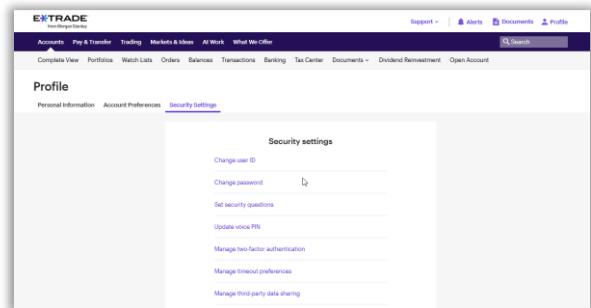
Account details and preferences

As you are getting familiar with your stock plan account, be sure to check out the **My Profile** page, where you can update your:

- Email or mailing address
- ID, password, security questions, two-factor authentication, and more



The screenshot shows the 'Profile' tab selected on the etrade.com My Profile page. It includes sections for 'Personal Information' (Email, Account holder, Address), 'Account Preferences' (Email, Account holder, Address), and 'Security Settings' (Email, Account holder, Address). A 'Profile' sidebar on the right offers links to Complete View, Portfolios, Watch Lists, Orders, Balances, Transactions, Documents, and Open Account.



The screenshot shows the 'Security Settings' tab selected on the etrade.com My Profile page. It includes sections for 'Change user ID', 'Change password', 'Set security questions', 'Update voice PIN', 'Manage two-factor authentication', 'Manage timeout preferences', and 'Manage third-party data sharing'. A 'Profile' sidebar on the right offers links to Complete View, Portfolios, Watch Lists, Orders, Balances, Transactions, Banking, Tax Center, Documents, Dividend Reinvestment, and Open Account.

You can view and manage your stock plan benefits by going to the **At Work** section. Here you will find **eight** tabs full of features and functionality to enable you to make the most of your stock plan benefits. Below are just the beginning of what you will find on each tab.

1. Overview:

- The ability to select a preferred language or currency
- Any action item that requires your attention
- A schedule of upcoming events
- Quick summary of your account values

Action Items (4)

- Accept your new grant (Jan 01, 2016)
- Stock Option Expiration Date (Jan 01, 2016)
- Stock Option Expiration Date (Jan 01, 2016)
- Stock Option Expiration Date (Jan 01, 2016)

Upcoming Events (7)

- Stock Options Expiration Date (Jan 01, 2016)
- Stock Options Expiration Date (Jan 01, 2016)
- Stock Options Expiration Date (Jan 01, 2016)
- 125 Expected to Vest Stock Options (Jan 01, 2016)
- 100 Expected to Vest Stock Options (Jan 01, 2016)
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- 100 Expected to Vest Stock Options (Jan 01, 2016)

Holdings Summary: Your Total Account Value is \$77,336.62

View by:	Status	Equity Type	
Equity Type	Allocation %	Quantity	Value
Restricted Stock Sell	57.36%	848.00	\$44,363.12
Stock Options Exercise	42.64%	1,500.00	\$32,973.50
Total	100.00%	2,348.00	\$77,336.62

2. Holdings:

- View your equity holdings (by type or status)
- See grant-specific vesting schedules

View By Type

View By Status

Restricted Stock (RS)

Grant Date	Granted Qty.	Vested Qty.	Unvested Qty.	Pending Release Qty.	Sellable Qty.	Ext. Market Value
01/01/2016	600	600	0	400	118	\$27,099.17
06/03/2025	330	0	330	0	0	\$17,263.95
Totals	930	600	330	400	118	\$44,363.12

3. Sell:

Where you will go sell any available equity through a step-by-step experience. If you decide to sell, once the trade settles, you can either have the proceeds sent to you or to another account outside of E*TRADE. You may also be in a qualifying country where you can hold the cash proceeds. See the section below for more information.

E*TRADE

Stock Plan Account

Create an Order

Would you like to sell at the market price or when the stock reaches a specific price?

Payout Type:

Date Acquired	Benefit Type	Ext. Cont Basis (per share)	Sellable Qty.	Select	Enter Number of Shares to Sell	Ext. Gross Proceeds	Expected Gain/Loss	Capital Gains Status
01/01/2017	Ret. Stock	\$23.25	100	<input type="checkbox"/>	0	\$0.00	\$0.00	Long Term
Totals								
100 0 \$0.00 \$0.00								

How would you like to receive your proceeds?

Choose Disbursement Option

4. Exercise (if applicable):

If you have been granted stock options, this is where you will go to exercise any available vested options through a step-by-step experience.

E*TRADE

Stock Plan Account

Create an Order

What would you like to receive from your exercise?

Payout Type:

How would you like to fund the Exercise?

Same Day Sale
Sell shares to cover the cost of the exercise.

New Exercise and Sell
Have shares withheld to cover the cost of the exercise.

Would you like to sell at the market price or when the stock reaches a specific price?

Payout Type:

Last Price (Size) Each	Bid (Size) Each	Ask (Size) Each	Volume
\$23.25 (\$0.10)(0.025)	\$23.25 (\$0.25)(100)	\$23.38 (\$0.00)(0)	24.8M

Which Stock Options would you like to exercise?

Enter the number of Stock Options you would like to exercise.

5. Orders:

Any orders placed in your stock plan account will appear here with additional details such as order status and order type.

E*TRADE

Stock Plan Account

Orders

Year	Benefit Type	Order Type	Order Status
2025	All	All	All

Brokerage Update Disclosure

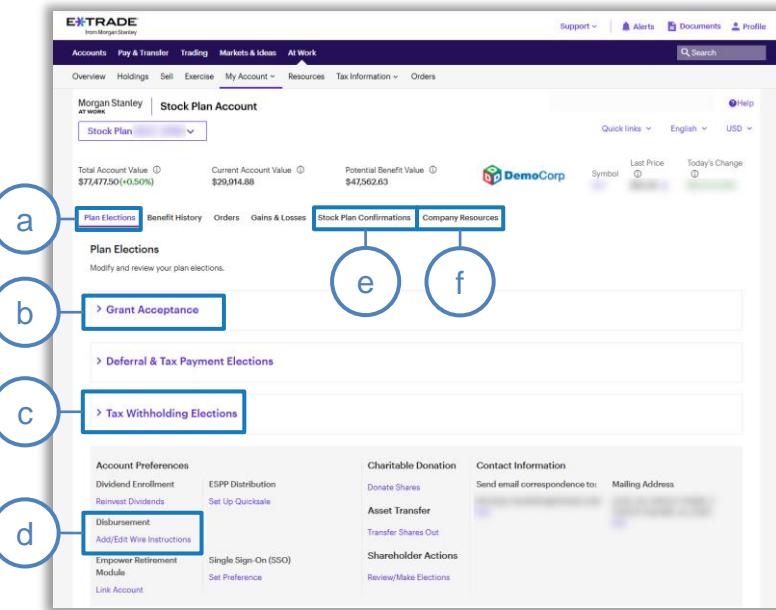
Benefit Type	Order Date	Order Type	Price Type	Shares to Exercise	Shares to Sell	Estimated Qty.	Sold Qty	Execution Price	Order Number	Original Order Number	Order Status
Restricted Stock	02/08/2025	Sell Restricted Stock	Mr	0	50	—	—	\$0.00	—	—	Cancelled

From Your Company

Year	Apply
2025	Apply

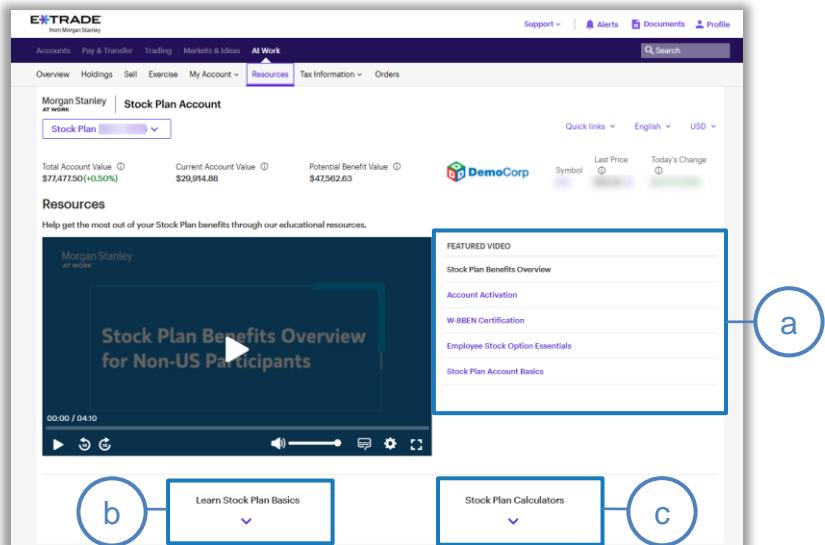
6. My Account:

- a. Plan elections
- b. Accept grants (if applicable)
- c. Tax elections
 - When you expand the Tax Withholding Elections panel, you will see the taxes your company has deemed eligible for electing desired tax rate percentages.
 - If you choose to elect a new rate, it will appear as the pending rate until it is approved by your company.
- d. Setup wire instructions
- e. Access stock plan confirmations
- f. View company documents and resources



7. Resources:

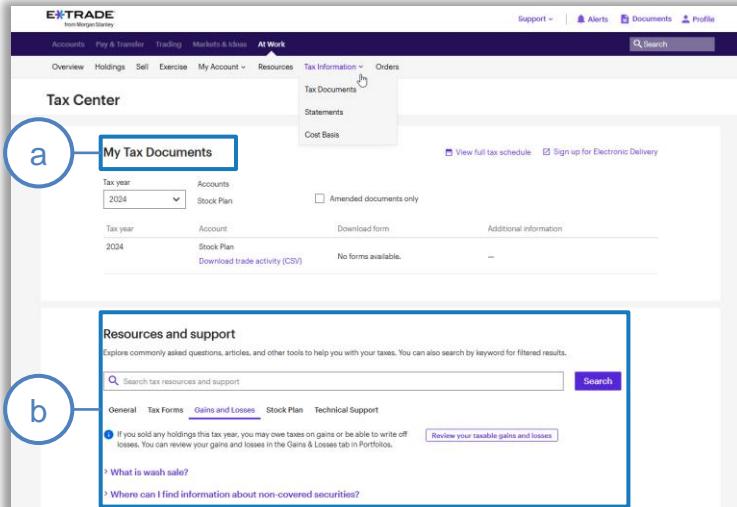
- a. Educational videos available with subtitles in 23 languages
- b. Educational articles
- c. Stock plan calculators



8. Tax Information:

When you click on Tax Documents you'll be directed to your Tax Center where you can find important tax forms. You'll also find helpful resources and support such as common tax FAQs and how-to guides for reporting taxes in the Tax Center.

- a. Tax Documents
- b. FAQs



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).

Investing in securities involves risk, including possible loss of principal.

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