

P&G OPTIONS MOVE TO E*TRADE

Earlier this year Proctor & Gamble started moving its stock option platform away from the legacy platform that has been in place and to E*Trade (P&G'S communication of this can be found [here](#)). This initial move only affected those who have retired from P&G, however, P&G recently announced that the move to E*Trade will include all current employees as well, and the move will be fully in effect beginning on May 20, 2019. Current employees are able to create access to E*Trade before this date. Only stock options will make the move over to E*Trade, as Restricted Stock Units (RSU's) will remain housed on the legacy platform accessed from the Life & Career section on the corporate homepage.

For those with stock options, you should have received an email that contains your authentication code. You need this code to set up your E*Trade account. If you haven't received the email, or are unable to locate it, go to <https://express.etrade.com/oa/rtaa/step1start-welcome> to get your account set up. The process to set up your account should only take 10-15 minutes, and is fairly intuitive.

Once you have your E*Trade account set up, there are a few operational changes with this platform that you should be aware of:

- **Real-Time Trading:** Under E*Trade, the trades you place occur in real-time as opposed to the old "batch" system used with the legacy platform, which placed trades at three different times throughout the day.
- **Limit Order:** If you had a limit order placed on certain option lots prior to the move to E*Trade, you will need to re-place these. In addition, limit orders



will now expire after being in place for 60 days.

- To enact a cashless exercise of your options, you now simply press "Cash" as the option to receive from your exercise (previously was "Sell all").
- If you have any issues navigating E*Trade, their stock option team can be reached anytime at 1-800-838-0908.

If you have any questions, please reach out to your team at Mariner Wealth Advisors, or reach out to [Brad Morgan](#) or [Nate Kunkel](#).

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