

2014 GOLD MEDAL WINNERS



E-MONITOR

About Us

Corporate Insight provides competitive intelligence and user experience research to the nation's leading financial institutions. For over 20 years, the firm has tracked technological developments in the financial services industry, identifying best practices in online banking and investing, online insurance, mobile finance, active trading platforms, social media and other emerging areas. There are no assumptions in Corporate Insight's work – we use live accounts at all of the firms we track, providing our clients with unparalleled, unbiased competitive intelligence.

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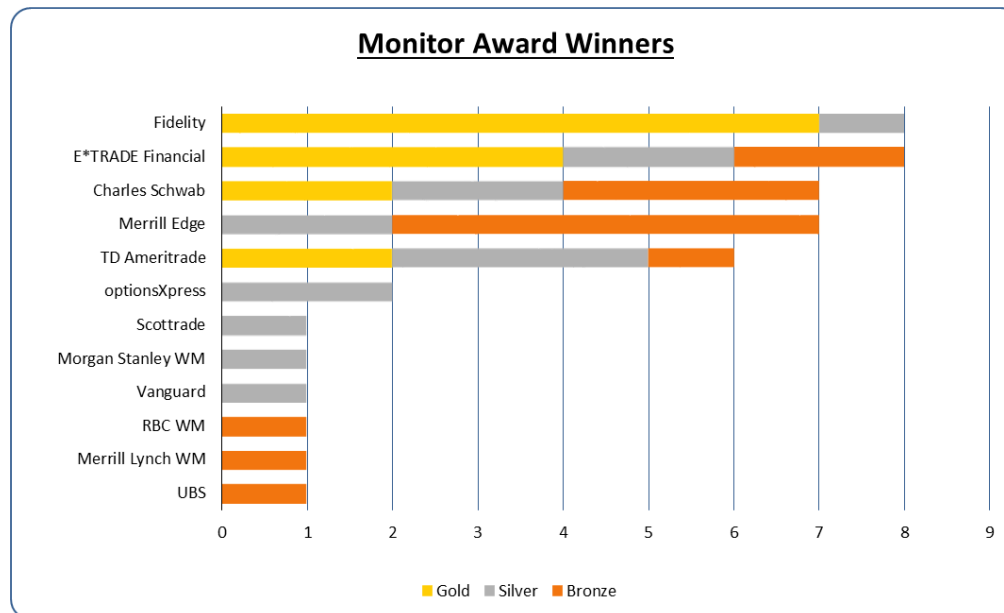
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eMonitor Awards

This month, we are proud to present our annual e-Monitor Awards Report, detailing the best features in nine areas of online brokerage offerings and functionalities: Account Information, Education Centers, News & Research, Online Documentation, Online Help, Product Range, Quotes, Tools & Calculators and Trade Tickets. Based on this review, conducted using our proprietary audit software and industry experience, we awarded gold, silver or bronze medals to those firms that go above and beyond.

To review, a Gold Medal is awarded to those firms that offer products, tools or website features that are innovative and extensive, meeting or exceeding all of the criteria we have established in each category, and provide an excellent resource to clients. Website offerings that provide good value but suffer from a few small flaws earn a Silver Medal. Finally, for offerings that are imperfect yet offer discernible value to users, we award a Bronze Medal.



Category Overview

- Account Information
- Education Centers
- News & Research
- Online Documentation
- Online Help
- Product Range
- Quotes
- Tools & Calculators



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A graphic consisting of a golden sphere with a white highlight and a black shadow, partially overlapping the text.

Account Information

In this category, we consider the overall depth of performance, balance, position and transaction details offered by our coverage group. We rewarded firms that provide real-time account figures, transaction history and position data. Additionally, we considered alert options, the length of transaction archives and whether account data can be downloaded via multiple platforms.

The logo for E*TRADE, featuring the word "E*TRADE" in a bold, black, sans-serif font. The asterisk is stylized with a green and purple cross-like shape.

E*TRADE maintains its strong showing in the Account Information category, based in large part on its detailed balance, position and performance evaluation offerings. The firm also offers excellent history, balance and portfolio data freshness, with key information updated in real-time. E*TRADE clients are also able to dive deeper into their portfolio performance through a series of customizable charts that compare their portfolio against major indexes and show account value over time.

The logo for Fidelity Investments, featuring a stylized sunburst icon to the left of the word "Fidelity" in a bold, italicized, green font, with "INVESTMENTS" in a smaller, black, sans-serif font below it.

Fidelity earns its second consecutive gold medal, following a partial revamp of the private site Accounts & Trade section. The redesigned pages and navigation made it easier for clients to view individual account information or in aggregate by adding a fixed account selection sidebar. The firm also redesigned the Positions tab by significantly increasing the amount of research provided for each of the client's holdings.



Education Centers

Over the years, the brokerage website has evolved from a simple account information tool to a comprehensive trading, research and portfolio management platform. Industry leaders offer in-depth content in a variety of formats including webinars, podcasts, videos, courses, and quizzes. For this category, we award firms that provide content in lesson format, as well as those with a variety of multimedia offerings.



E*TRADE earns its third consecutive gold medal for its impressive online Education Center, featuring an extensive library of educational resources which span a wide range of investing and personal finance topics. The firm boasts one of the largest rosters of third-party education content to help bolster internal offerings, including Forefield, Smart Money, Investopedia and Investing Classroom courses through Morningstar – to name a few.



Fidelity earns its seventh gold medal. Similar to E*TRADE, Fidelity overwhelms with the sheer quantity and variance of resources and topics covered within its Learning Center. Though basic investor education can be somewhat spotty, the firm excels at providing a wide range of advanced investing topics. Several dedicated personal finance main menu tabs combine educational resources and actionable, step-by-step guidance.



TD Ameritrade earns its fourth consecutive gold medal further following a massive overhaul and expansion of its Education Center in early 2014. Though the firm suffers somewhat from a lack of personal finance education, its innovative use of gamification, comprehensive and engaging video courses and diverse skill-based resource offerings easily secured the highest award in this category.



News & Research

We evaluate market and security research and news content, research reports and related tools, rewarding firms that provide accessible news and research from a variety of sources. The news and research resources we took under primary consideration in this category were general market news offerings, sector- and industry-specific research, product-specific research and charting capabilities. We secondarily considered news, price and research alert capabilities and product screeners.



Charles Schwab continues to provide exceptional resources, having medaled in this category since 2001. Excellent news and research content covers both U.S. and international markets, along with a variety of sectors and industries, as well as specific investment products. The firm offers a wide selection of individual product screeners. It is important to note that the firm has not made any wide-reaching or innovative changes to its Research section over the past year.



Fidelity earns its 11th consecutive gold medal for offering an excellent selection of news content, research reports and related tools and resources to provide clients with a comprehensive view of both U.S. and global markets. Furthermore, the firm made a number of enhancements to its public and private websites this year. These enhancements include a beta version of a revamped stock screener, improved ETF charts and two redesigned research sections – Stock Research and Fixed Income Research.

Online Documentation

This category analyzes the online account document management capabilities, focusing specifically on the variety of paperless documents available, the accessibility and depth of the document archive, and paper suppression options. All highly ranked firms in this category offer the three standard document types (statements, trade confirmations and tax records), as well as easy accessibility to a centralized documentation center, all account documents, extensive archives and free access to electronic or paper documents.



Fidelity earns its fifth consecutive gold medal for an easily accessible online documentation center located as a sub-tab within the main Accounts & Trade tab. The center provides quick links to adjust e-delivery preferences, and clients can enroll one or all documents in e-delivery.

Online Help

Online help centers are an important resource to help users navigate and manage the wide breadth of information and functionalities offered on brokerage websites. This category specifically analyzes the accessibility of section-specific help content through conveniently located links and effective search tools for users' queries, in addition to live chat features and online message platforms that allow for responsive customer service.



Fidelity retained its gold medal, continuing to excel in this category by offering excellent live chat and message platform capabilities, as well as a dynamic site search functionality. The firm's online help resources are easily accessible and provide an array of useful section-specific content to assist users in navigating the site.



Product Range

The range and availability of investing products is often dependent on whether a brokerage firm is full-service or discount. Most brokerage firms offer bond trading and cash management services like funds transfer and options trading, among other products and services. In this category, we evaluate brokerage firms based on the range of products and services they provide. Firms that offer the best all-around range of products, serving the broadest possible range of individual investors, were awarded the highest ranking. We assessed online trading capabilities for stocks, ETFs, mutual funds, options, bonds, CDs and international stocks. We also took into account other products that are available to retail investors online, including futures, forex and IPO participation.



Charles Schwab retained its gold medal, as it offers investors a full range of baseline investment products and online trading capabilities, as well as a suite of planning and advisory services. Though the firm caters primarily to the mass affluent, it also offers products and services for active traders and higher-net-worth clients.



E*TRADE earned a gold medal in this category for offering a wide range of investment products, providing brokerage clients with access to an excellent range of cash management products and advisory services.



Fidelity continues to offer an excellent range of investment products and services for self-directed and active investors, as well as free cash management features and a wide range of advisory services and managed accounts. Cash management features are included within the Fidelity CMA account, which carries no minimum deposit or annual fees. Through the Fidelity Strategic Advisors group, affluent clients with a minimum of \$200,000 in assets can open actively managed accounts, including a municipal separately managed account that includes management oversight from Breckinridge Capital Advisors.



Quotes

One of the core functions of brokerage websites is to provide clients with timely market data, including real-time security quotes, charts, watchlists and similar features. In evaluating quotes, we looked at all available quote details, placing emphasis on whether a firm offers free streaming real-time quotes to all clients. We also considered quote profile details, static quote retrieval tools and watchlist details.



E*TRADE

E*TRADE Financial is awarded its third consecutive gold medal in this category, for an excellent range of quote tools which provide in-depth data. The firm offers real-time streaming quotes through the E*TRADE 360 tool and MarketCaster, both of which are available for free to all clients. The firm also offers a static quote field, a collapsible quote bar, detailed quote profile pages and an excellent selection of watchlist capabilities.



TD Ameritrade

TD Ameritrade is once again awarded the gold medal in the Quotes category, and now has won the gold every single year since the merger of TD Waterhouse and Ameritrade in 2006. The firm provides an excellent selection of quote capabilities, with a static quote bar that provides streaming, real-time quotes and access to a variety of private site tools and resources. Over the course of 2014, the firm further improved its quote tools by revamping watchlists and adding a new streaming quotes module to the My Dock feature.

Tools & Calculators

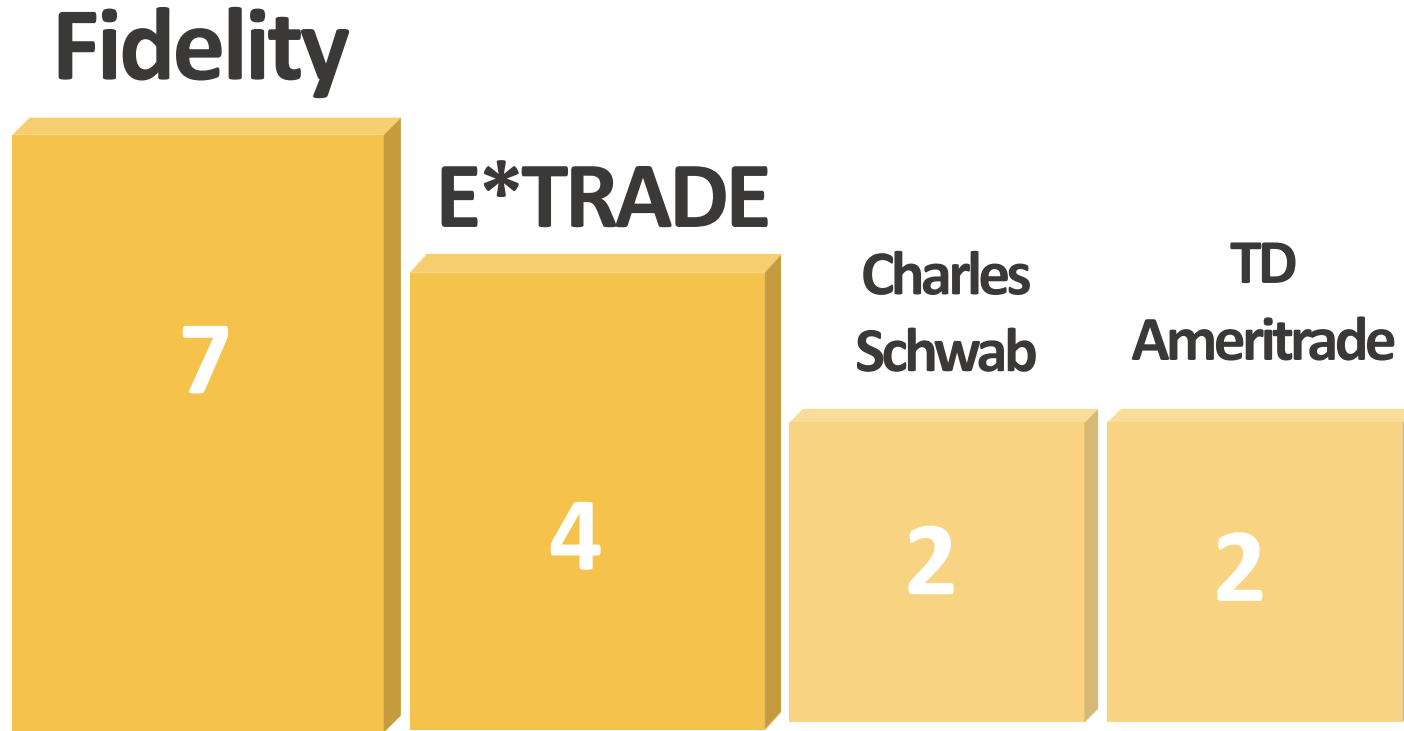
Financial planning tools and calculators can help investors evaluate their portfolio, plan for future goals and receive basic answers to questions about their personal finances. Most firms offer these tools free to all investors, and position them as valuable resources to clients. These tools can help offer investors a quick and easy way to think about their personal finances and understand whether future goals are within reach. As a result, we looked at three types of tools: financial calculators, goal-planning tools and asset and portfolio analysis tools.



Fidelity earned the sole gold medal in this category for offering myriad tools and calculators that help clients plan for major life events and goals. The firm offers by far the most extensive, in-depth results, analysis and recommendations of any firm, and allows clients to import existing internal and external account balances – a key component for offering meaningful and tailored results.



2014 Top Gold Medal Winners



Fidelity leads with seven gold medals, followed by four for E*TRADE, and two for Charles Schwab and TD Ameritrade.

Contact Us

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