

2013 GOLD MONITOR AWARD WINNERS



BROKERAGE

ABOUT CORPORATE INSIGHT

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 research, providing our clients with unparalleled, unbiased intelligence on the competition.

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CATEGORY OVERVIEW

1. Account Information
2. Education Centers
3. News & Research
4. Online Documentation
5. Online Help
6. Product Range
7. Quotes
8. Tools & Calculators
9. Trade Tickets (No Gold Winners)



Did your firm earn a 2013 Gold Monitor Award for excellence in the online and customer experience?

SHOW IT OFF! Contact us at PR@Corporateinsight.com to learn more!

ACCOUNT INFORMATION

E*TRADE Financial and Fidelity earn Gold Monitors for their overall strong and thorough offerings of account information, balance and position details and related content.

E*TRADE has now won nine consecutive Gold Monitors in this category, while Fidelity is a newcomer to the top of the podium.



EDUCATION CENTERS

E*TRADE Financial and TD Ameritrade repeat as Gold Monitor winners in the Education Centers category, and are joined at the top by Fidelity. TD Ameritrade has received a Gold in this category for three consecutive years, and Fidelity has secured a Gold in six of the past seven.

All three firms feature centralized Education Centers that offer a wide variety of investing, planning and product education resources spanning a variety of content mediums.



NEWS & RESEARCH

Charles Schwab and Fidelity continue their dominance in the News & Research category, as the firms have now earned a Gold Monitor in this category for 13 and 10 years in a row, respectively.

Both firms provide clients with stellar all-around domestic and international market research, including specific product markets (e.g., stock, fund research) and related tools.



ONLINE DOCUMENTATION

Fidelity takes home the sole Gold Monitor for offering an extensive online document archive for all key documents, and for providing excellent access to it. All Monitor winners in this category offer paperless account options, an important capability in today's digital world.



ONLINE HELP

Fidelity once again received the sole Gold Monitor for offering the best all-around help resources. This includes a universal chat tool, targeted help content through all site sections, a detailed site search and a good online message center.



PRODUCT RANGE

Charles Schwab, E*TRADE Financial and Fidelity allow investors to trade all major products online, and offer excellent cash management features along with some advisory accounts.

In addition, these firms offer investors access to other products beyond the standard product range, such as futures and forex.



QUOTES

E*TRADE Financial, optionsXpress and TD Ameritrade all take home Gold in this category, as each firm provides strong quotes details, functionality and tools.

E*TRADE Financial has now won the Gold Monitor in back-to-back years, while optionsXpress and TD Ameritrade have won the Gold every year dating back to 2005 and 2006, respectively.



TOOLS & CALCULATORS

Fidelity earned the sole Gold Monitor for offering the most extensive range and depth of tools across all planning topics.



CONTACT US



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Corporate Insight is happy to assist all Gold Monitor Award winning firms in promoting their honors. For more information and to see examples of past promotions, contact us at PR@Corporateinsight.com.

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ABOUT E-MONITOR

Launched in 1998, **E-Monitor** serves as the online complement to our flagship Broker Monitor service. E-Monitor continuously tracks and analyzes the online user experience offered by leading brokerages. Using actual brokerage accounts, E-Monitor offers you a first-hand look at the online account resources, interactive tools, transaction capabilities, education content and other features your competitors in the brokerage industry provide prospective clients and prospective investors on their websites.

E-Monitor Subscriptions Include:

- **Monthly Research Reports** – In-depth reports that focus on key aspects of the online client and prospective investor user experience including online account resources, education content, interactive tools, industry trends and more.
- **Weekly Updates** – Comprehensive weekly reviews of changes and additions to competitor public and client websites.
- **Client Website Videos** – Go behind-the-login and take a first-hand look at your competitor's online client resources.
- **Competitor Summary Matrices** – Breakdown of key features offered on competitor public and client websites.
- **Analyst Support** – Personalized research support from our experienced *E-Monitor* team.

E-Monitor Coverage Firms

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ShareBuilder
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