

# TradeKing Email Update

## Strategy

Larger, more engaging copy. Lifestyle Imagery. Simplified layouts and vibrant palettes.

## Learnings

People not looking at the camera has a more natural and less challenging feel. Up close eye contact can make photos feel stock, artificial and create customer disconnect.

## Results

Our funding campaign update (lower) showed a 3% increase in clickthrough rate and resulted in 300 additional funded accounts in the months following its launch.

ORIGINAL

UPDATED



Be One

## WEEKLY OPTIONS REVIEW

SIGN UP NOW!

Our newest live program!  
15 minutes on Mondays 12 Noon ET

We've expanded our weekly lineup to serve you better!

**Weekly Options Review on Mondays, 12 noon ET**  
Grab your lunch and spend 15 minutes with former CBOE market maker Dan Sheridan of Sheridan Options Mentoring, and TradeKing Senior Option Analyst Brian Overby, as they team up for TradeKing's newest and exciting live event, the **Weekly Options Review**. Join us for Dan's potential trade set-up and Brian's analysis of the week. Don't miss it! Every Monday midday from 12:00 – 12:15pm ET. [Register now](#).

**Midday Market Call on Tuesdays, 12 noon ET**  
Get solid market analysis and potential trading ideas. Take 15 minutes of your lunch with Barron's columnist and Chartered Market Technician, Michael Kahn of Quick Takes Pro, and TradeKing Option Guy Brian Overby, as they analyze the market during this live online session. As an added bonus, Michael shares the Quick Takes Pro "Chart of the Day" and Brian discusses at least one option trade. This might be the most valuable thing you do all week! Every Tuesday midday from 12:00 - 12:15pm ET. [Register now](#).

Best regards,  
Nicole Wachs  
Director of Education  
Producer of Midday Market Call

We're Now One Family

Options involve risk and are not suitable for all investors. For more information, please review the Characteristics and Risks of Standard Options brochure available at [www.tradeking.com/ODD](http://www.tradeking.com/ODD) before you begin trading options. Options investors may lose the entire amount of their investment in a relatively short period of time.

Online trading has inherent risk due to system response and access times that may vary due to market conditions, system performance, and other factors. An investor should understand these and additional risks before trading.

Multiple leg options strategies involve [additional risks](#) and multiple commissions, and may result in complex tax treatments. Please consult a tax professional prior to implementing these strategies.

Michael Kahn and Dan Sheridan, who are not TradeKing employees, act independently, and no speaking topic, session, or content (including opinions or comments) are affiliated with, or approved, sponsored or endorsed by TradeKing. Webinars, topics and sessions are provided for educational and informational purposes only. No investment, trading or tax advice regarding any security, group of securities, market segment or market is intended or shall be given. Any examples used in sessions or speaking topics are for illustrative purposes only — they should never be construed as recommendations or endorsements of any kind. No particular trading strategy, technique, method or approach discussed will guarantee profits, increased profits or provide minimization of losses. Past performance, whether actual or indicated by simulated historical tests, is no guarantee of future performance or success. Supporting documentation for any topic, session or content will be e-mailed upon request. You alone are responsible for evaluation the merits and risks associated with the use of TradeKing's

SPECIAL OFFER

## FREE ETF ALERTS FOR TRADEKING CLIENTS

Sign Up Today

Offered by Trading Central

Trade precious metals, focus on dividends, or invest internationally —with ETF Strategy Alerts, provided by Trading Central.

Here's what you'll get with this FREE subscription:

- Timely ETF trade ideas as potential market opportunities arise
- ETF alerts based on market events, technical analysis, and other Trading Central proprietary methods
- In-depth analysis of each ETF trade idea
- 4 to 6 ETF alerts per month, which are either bullish or bearish depending on market conditions

This is a free subscription which you can cancel anytime. All alerts are based on selected iShares ETFs. Most active symbols by volume: EWJ, EWZ, FXI, IAU, SLV, TLT\*

Sign Up Today

Not sure what an ETF is?

Strategy Alerts from Trading Central are based on proprietary analysis of selected iShares ETFs\*. iShares are a family of exchange-traded funds managed by BlackRock. There are other families of exchange traded funds managed by other companies. Visit our Education Center to learn more about ETFs, the [benefits and risks of using ETFs](#), how to use bullish strategies to [buy long](#), and to understand bearish strategies used to [sell short ETF shares](#). Shorting requires a margin account and is not permitted in retirement accounts.

Trading Central's ETF Strategy Alerts are not customized for investors and therefore are not recom-

### Finish opening your account, and start reaping the benefits today.

Dear %fullname%:

Thanks for your interest in TradeKing. We noticed you did not complete our new account registration. We would love for you to come back and finish.

If there's anything we can do to help, please call one of our licensed brokers at (877) 495-KING (5464). Or, use our [live chat](#) feature. We'll be happy to answer any questions or walk you through the registration process.

To continue the registration, please log into TradeKing by entering your username on the [client log in page](#). Your username starts with %username%. If you don't remember your password, just click on the "forgot password" link.

Here is a reminder of just a few of the benefits you'll enjoy at TradeKing:

- Our fair and simple price, with no minimums. Just \$4.95 per trade plus 65 cents per option contract.\* [Compare our pricing](#).
- Our innovative Trader Network where investors can see what others are trading, how their trades are performing, and the rationale behind them.
- Free access to our suite of research and trading tools, like Market Grader Research Reports, Maxit Tax Manager, Probability Calculator, Profit and Loss Calculator, Stock and Option Screeners, Technical Analysis Tools and much more.
- 19 types of option chains and a full complement of advanced orders.
- TradeKing is one of the most [highly awarded online brokers](#)\* in the industry.

We look forward to making your online investing experience second to none. So [log in](#) and complete your account registration today.

Best regards,

Donato A. Montanaro | CEO, TradeKing  
Email Don (or follow Don on Twitter)  
Visit the Trader Network

# This tax season, fund your IRA – and lower your tax bill.

Contribute Now

## Make a contribution to your TradeKing IRA before April 15.

**Retirement got you worried?** Do something about it – open an IRA today. For tax-year 2014, you can make a tax-deductible contribution of up to \$5,500 or \$6,500 if you're 50+.\* That's a great way to stash cash aside for your future – and lower your tax burden for 2014.

Contribution Deadline:  
April 15, 2015

Contribution Limits:  
2014: \$5,500\* / 2015: \$5,500  
\*If you were age 50 or older on 12/31/14, your 2014 limit is \$6,500.

Client Services is ready to help

Contribute Now

# Take the fast track to trading.

Wondering where to start?  
Your first step is simple:

FUND YOUR TRADEKING ACCOUNT

Forgotten your password? [Reset it here](#).

When your account is funded, you'll be able to take full advantage of the popular services recommended by clients like you:

- Access the LIVE trading platform at your desk or on the go.
- Track trends and customize email alerts.
- Sign up for a webcast designed for your investment goals and experience.
- Use our flexible charts and option tools to sharpen your trading skills.

**Help is at hand.**  
Contact our award-winning Client Services team, M-F from 8 am – 6 pm, via [email](#) or phone at 877-495-5464. [Live chat](#) is also available.

Online trading has inherent risks due to system response and access times that vary due to market conditions, system performance and other factors. An investor should understand these and additional risks before trading.

All investments involve risk, losses may exceed the principal invested, and the past performance of a security, industry, sector, market, or financial product does not guarantee future results or returns. TradeKing provides self-directed investors with discount brokerage services, and does not make recommendations or offer investment, financial, legal or tax advice. You alone are responsible for evaluating the merits and risks associated with the use of TradeKing's systems, services or

# There's more to TradeKing than trading.

Your new TradeKing account has more perks than \$4.95 per trade. But you can't take full advantage of our award-winning services (like the flexible LIVE trading platform) until you take the next step:

SIGN IN TO FUND YOUR ACCOUNT

Forgotten your password? [Reset it here](#).

**Questions?**  
Contact our award-winning Client Services team, M-F from 8 am – 6 pm, via [email](#) or phone at 877-495-5464. [Live chat](#) is also available.

Online trading has inherent risks due to system response and access times that vary due to market conditions, system performance and other factors. An investor should understand these and additional risks before trading.

All investments involve risk, losses may exceed the principal invested, and the past performance of a security, industry, sector, market, or financial product does not guarantee future results or returns. TradeKing provides self-directed investors



# TradeKing LIVE

## Strategy

Make the TradeKing logged in experience more approachable by breaking down relevant information in to multiple customizable data blocks.

Power users could also access a more data intensive experience like they were used to (lower) with significant customization upgrades.

## Learnings

Users fear change when it comes to their finances and need motivation and education to make the switch to a new platform.

A responsive platform will never be as performant or functional compared to a standalone mobile app.

## Results

TradeKing received multiple awards including “#1 Broker Innovation” by StockBrokers.com.

HOME

DASHBOARD





# Ally Invest Mobile

## Strategy

Reduce the steps involved when placing a mobile trade and create a native experience that is more sustainable for future development.

## Learnings

While not the intended goal of the user test we learned there were intimidating parts of the mobile app that users would avoid out of caution. We created a sister project to increase education throughout the app.

## Results

User testing showed users could place a frustration-free trade in less time than competing apps. Ally Invest mobile went from one of the highest number of taps, 17, to as low 7.






[View in Browser](#)



**A NEW TRADEKING HAS ARRIVED.**



**Dashboard**  
Streaming. Flexible. Fast.



**Customizable Home**  
Your home – organized the way you want it.




**Research Center**  
Market indices, quotes, news and tools.

Sign into your TradeKing account, and click **TradeKing LIVE** located at the top of every page.

[LEARN MORE](#)
[SIGN IN NOW](#)



 Questions? Contact us at [service@tradeking.com](mailto:service@tradeking.com) or 877.495.5464.

Discalimers Ed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque  
 Totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. ed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium



[View in Browser](#)

# A new TradeKing - the way you want it.





**All-in-one Dashboard**  
Watchlists. Holdings. Order Status. And, more. All on one page.




**Customizable Home**  
Your home. Set it up just the way you want it.



**Research & Tools**  
Markets. Charts. Options analysis. We've got you covered.

Sign in to your TradeKing account, and click **TradeKing LIVE** located at the top of every page.

[LEARN MORE](#)
[SIGN IN NOW](#)


 Questions? Contact us at [service@tradeking.com](mailto:service@tradeking.com) or 877.495.5464.

Discalimers Ed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque  
 Totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. ed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium

EMAILS

# TradeKing LIVE Marketing

## Strategy

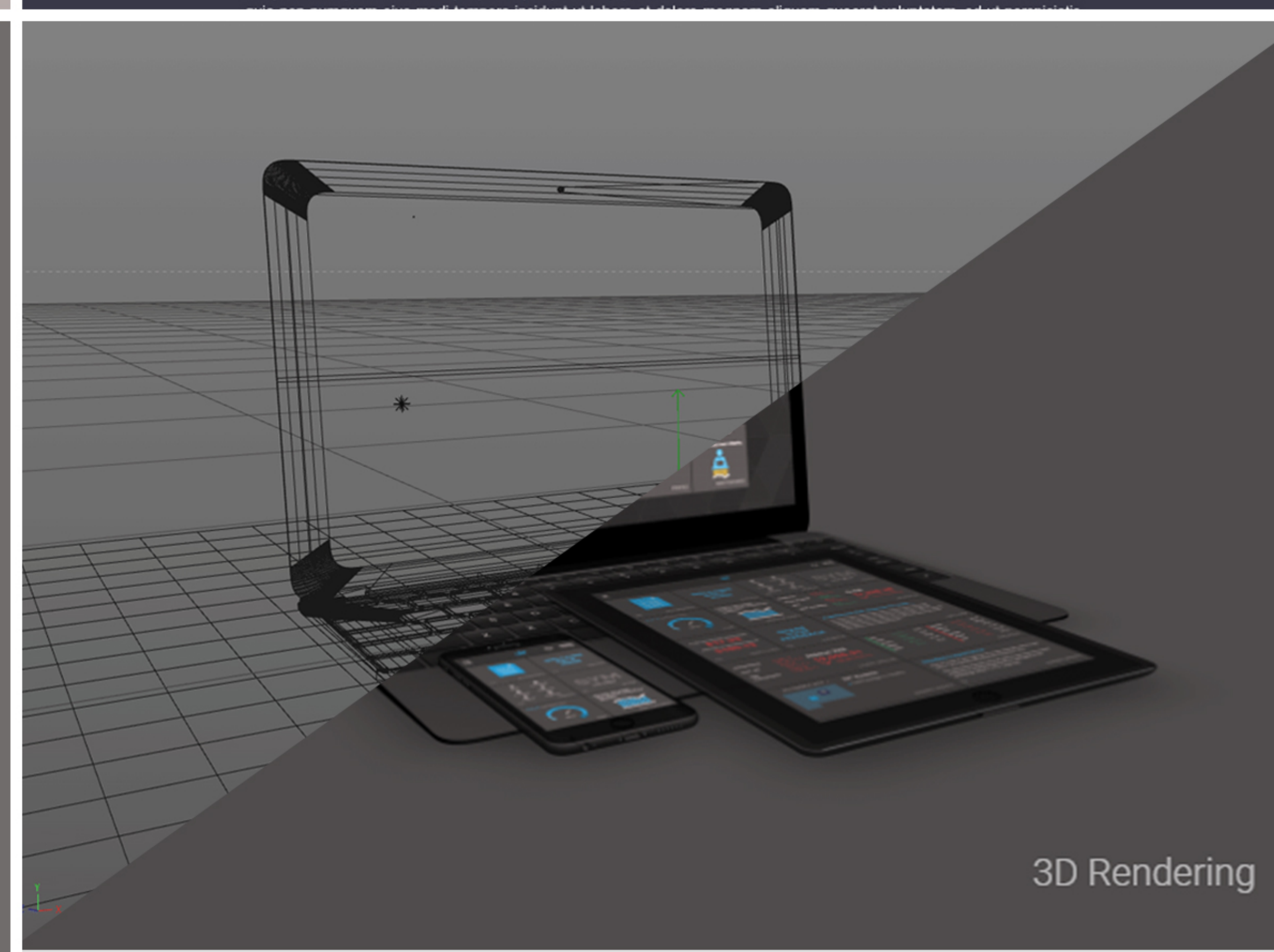
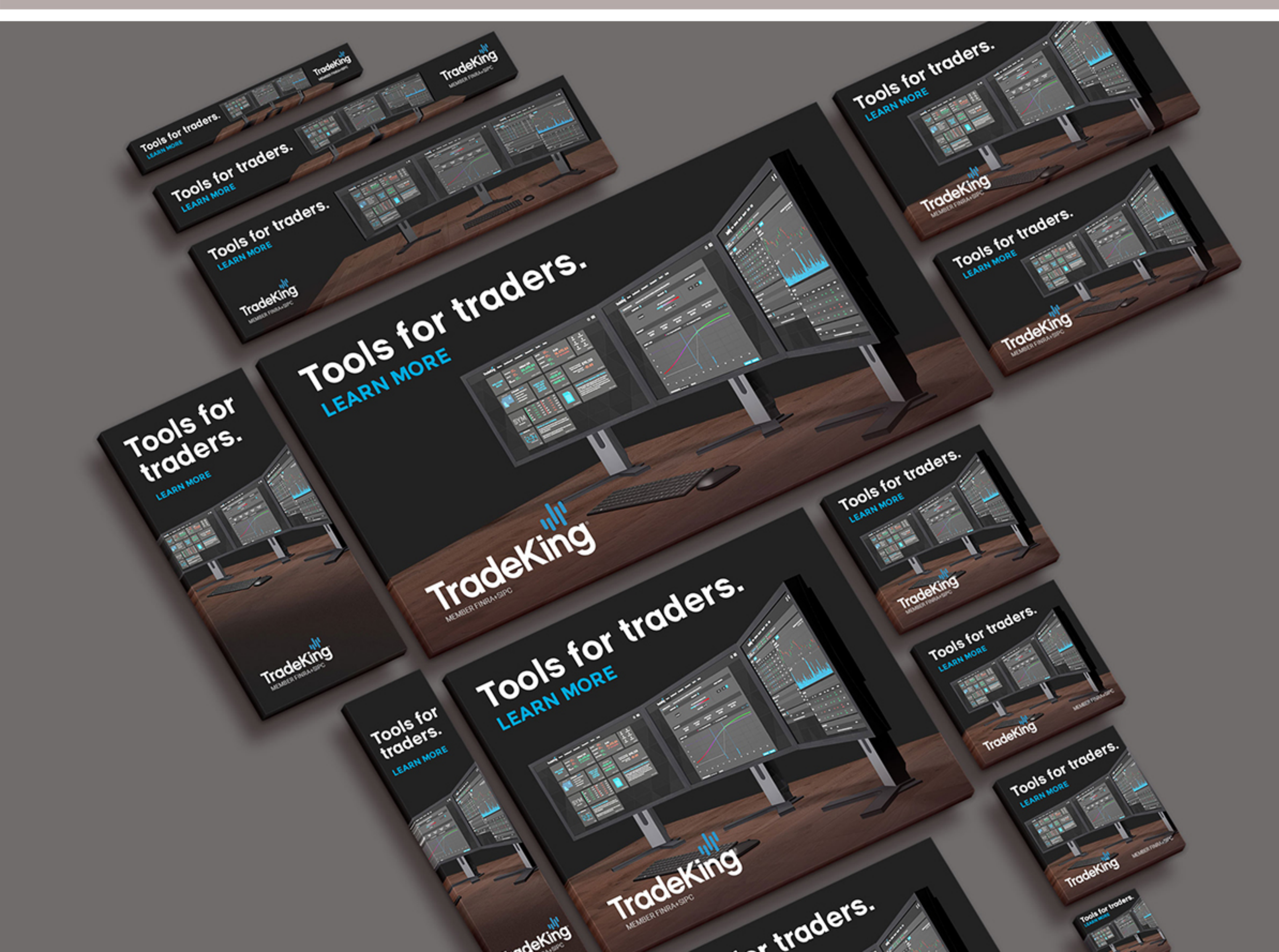
A high-level intro to the features of LIVE to stimulate users to switch to the new platform.

## Learnings

Users responded well to trying new platform once they were aware of the benefits.

## Results

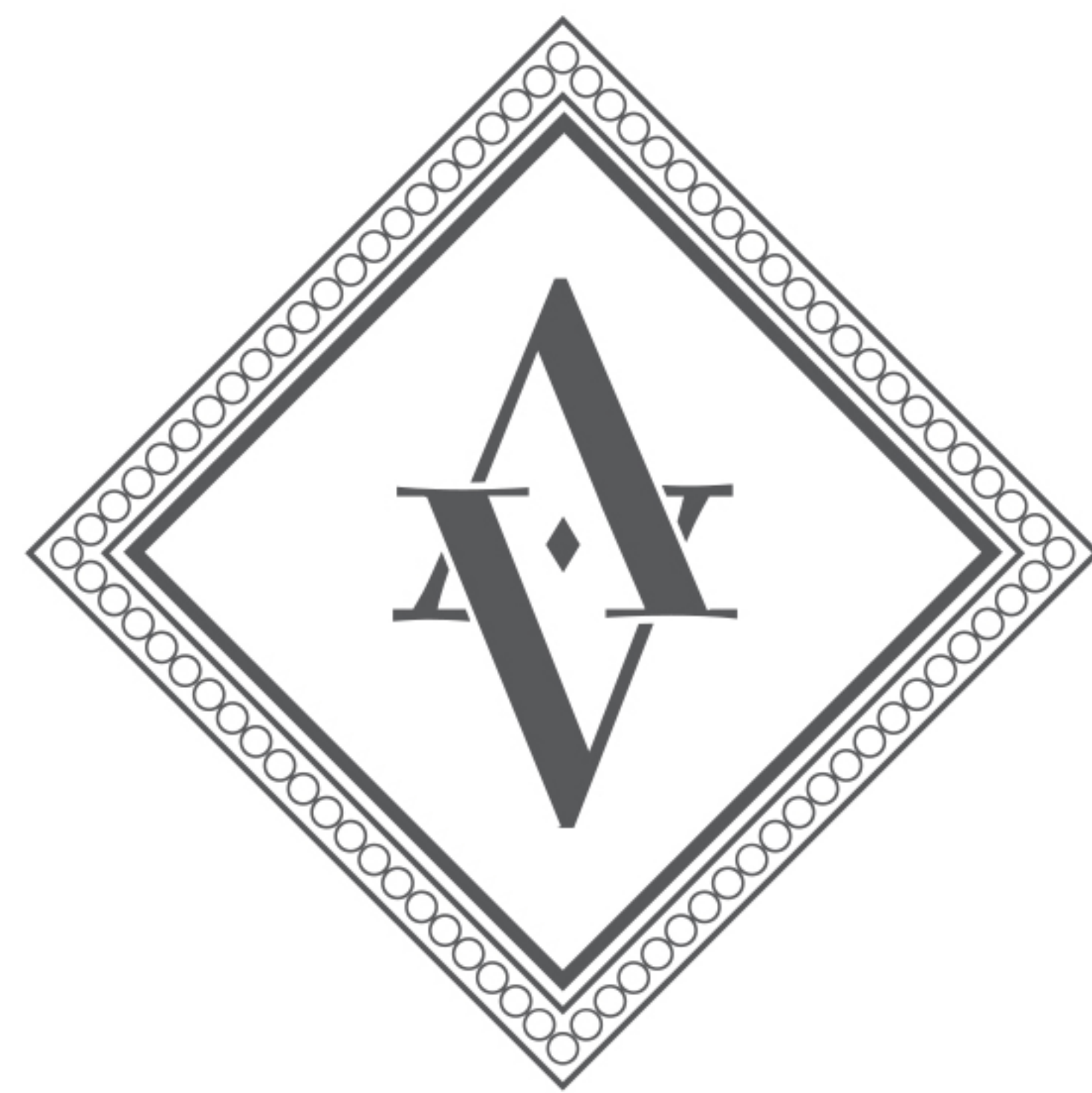
While successful we learned that nearly 100% of original features would have to be recreated in LIVE to feasibly force all users to the new platform and disable the original.



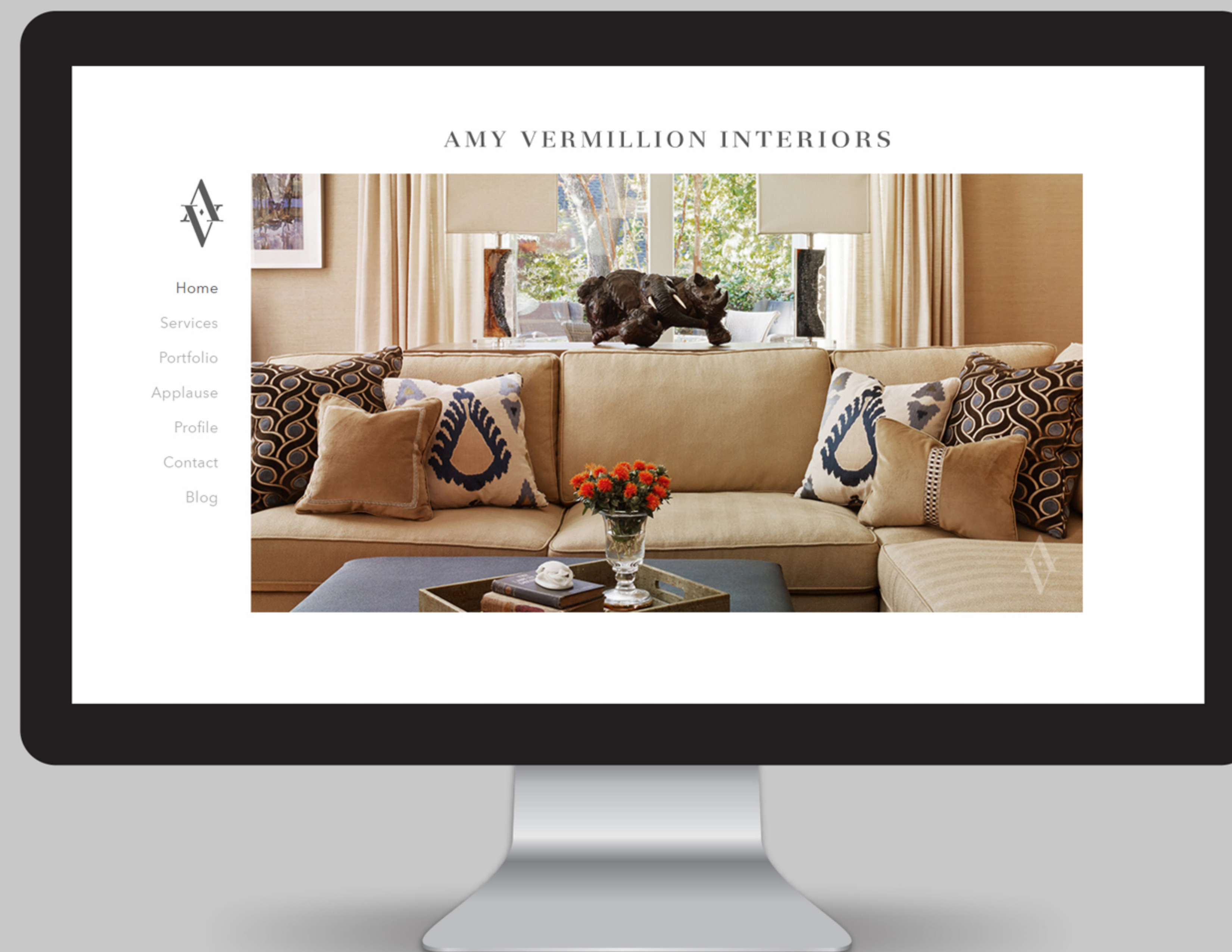
ONLINE ADS / RENDERING







AMY VERMILLION  
INTERIORS



# Amy Vermillion Interiors

## Strategy

Refresh the branding and modernize the website for this award-winning designer.

## Learnings

Fellow designers are great to work with.

## Results

Her business picked up drastically after updating her site and utilizing her blog to connect with potential clients and increase her search rankings.

