

Investools FAQs

Q1: How is the merger with TD AMERITRADE going to affect my subscription with Investools?

It won't. The merger will have no affect on your subscriptions. We will honor all current contracts, and we will continue to offer any workshops, courses and online offerings that you've signed up to take.

Q2: I already have a TD AMERITRADE account. Will Investools courses be available to me at no charge?

Investools will continue to operate as an education company and remain separate from TD AMERITRADE, the brokerage. There will still be a charge for these courses as they can be valuable tools to help you become a better active investor.

Q3: How will I benefit from joining TD AMERITRADE?

Investools clients can take advantage of TD AMERITRADE brokerage services by opening a TD AMERITRADE account. You'll enjoy features such as:

- A wide selection of investment choices, including stocks, bonds, options, Exchange Traded Funds (ETFs), mutual funds and Certificates of Deposit (CDs)
- Innovative online tools — named in 2009 by *SmartMoney* magazine as the best trading tools among discount brokers
- Independent third-party research to help you make informed decisions
- 24/7 phone support
- 100 branches nationwide

Q4: Are the Workshops still going to continue? Interactive Stocks and Options, AIAT, High-Probability Trading, The Wall?

We will continually improve and expand our educational offerings, so they meet the needs of our students and respond to the current market.

Q5: Are the prices of education going to change? Increase, decrease, be offered free of charge?

All prices will remain the same for now. There are no plans to increase or decrease the charges for any of Investools' educational offerings.

Q6: What are the different/new courses that are going to be offered?

It is too early to share details on any specific new courses. We are committed to constantly expanding our educational offering to meet the needs of our students and the changing market.

Q7: Is Investools going to be around after the merger?

Investools will continue to service your account and offer courses.

Q8: What will happen to my account(s) with Investools?

There will be no change in your account(s). You will continue to have access to Investools through your account. We will honor your contracts and continue to offer the courses in which you've enrolled.

Q9: Will I have access to TD AMERITRADE's products and services?

Only clients of TD AMERITRADE brokerage have access to TD AMERITRADE products and services.

Q10: I do not have a brokerage account. What are my brokerage account options as an Investools student?

You can open a TD AMERITRADE account at any time to gain access to its products and services. The process is simple and straightforward. You can begin by going to www.tdameritrade.com and clicking "Open an Account." You can also call them at 800-454-9272 or stop by one of their branch offices.

However, if you want to trade complex options, futures or foreign exchange (forex) in the near future, you may wish to open a thinkorswim account at this time.

Q11: I already have a brokerage account at thinkorswim. Do I need to do anything?

No, you do not need to take any action. If you are a current client of the thinkorswim brokerage business, you'll continue to be able to trade on your favorite thinkorswim platform, at your current commission rates.



Q12: Will the education be the same? Will you continue to honor all education purchased before the merger?

We will honor all current contracts and subscriptions. You will be able to take any educational offerings and subscriptions for which you have signed up. We plan no immediate changes to Investools' courses and workshops.

Our long-term goal is to continue to expand and improve education to meet the needs of investors in a changing market.

Q13: Will coaching be the same as it is now?

There will be no changes to the coaching services that we provide.

Q14: Will I get a discount on my trades with TD AMERITRADE, as I do with thinkorswim for being an Investools student?

TD AMERITRADE offers a low across-the-board commission of \$9.99 for every online equity trade. We will keep you posted as to whether they intend to offer any discounted pricing for Investools students.

Investools students who choose to open an account at thinkorswim will continue to receive the discounted commission rate.

Q15: What is the relationship between thinkorswim and Investools now with the merger?

thinkorswim, the brokerage, and Investools, the education company, are now wholly owned subsidiaries of TD AMERITRADE Holding Corporation, which also owns the TD AMERITRADE brokerage. There will be no changes in your accounts or your ability to trade. Our goal is to make this conversion as smooth and seamless as possible, and little or no action will be required on your part.

Neither Investools nor its educational subsidiaries nor any of their respective officers, personnel, representatives, agents or independent contractors are, in such capacities, licensed financial advisers, registered investment advisers or registered broker-dealers. Neither Investools nor such educational subsidiaries provide investment or financial advice or make investment recommendations, nor are they in the business of transacting trades, nor do they direct client futures accounts or give futures trading advice tailored to any particular client's situation. Nothing contained in this communication constitutes a solicitation, recommendation, promotion, endorsement or offer by Investools, or others described above, of any particular security, transaction or investment.