



## AMERITRADE TODAY

Ameritrade Holding Corporation ([www.amtd.com](http://www.amtd.com)) has a 27-year brokerage history of providing a self-directed approach to investment services. The Company, through its Private Client and Institutional Client divisions, provides tiered levels of brokerage products and services tailored to meet the varying investing, trading and execution needs of individual investors, financial institutions and corporations. Ameritrade's landmark merger with Datek Online Holdings Corp. combines the client service, technology, products and innovation of both companies to bring enhanced value to its clients and shareholders.

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### Merger Milestones

- **April 8, 2002** Ameritrade and Datek announce the landmark merger
- **August 5, 2002** The Securities and Exchange Commission declared the Form S-4 effective
- **September 4, 2002** The National Association of Securities Dealers (NASD) approves the change of control of Datek's broker-dealer subsidiaries
- **September 5, 2002** Ameritrade shareholders vote in favor of the merger by 99% and announce the new board
- **September 6, 2002** Datek stockholders vote in favor of the merger by 97%
- **September 9, 2002** Merger officially closes and the new Ameritrade is created

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### Industry Firsts

- **1988** Ameritrade subsidiary Accutrade is first to introduce touch-tone telephone trading
- **1994** Ameritrade, through acquisition of Aufhauser, is first to offer Internet equity trading
- **1996** Datek is first to begin a 60-second execution commitment
- **1999** Ameritrade is first to offer account access, place trades and receive stock alerts using wireless web phones
- **1999** Datek is first to provide free, real-time streaming quotes
- **2001** Datek is first to offer a Web-based direct access trading product
- **2002** Ameritrade is first to guarantee 10-second trade execution on S&P100<sup>®</sup> equities

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### Corporate Information

#### EXECUTIVE OFFICERS

**J. Joe Ricketts** Chairman and Founder

**Joe H. Moglia** Chief Executive Officer

**Phylis M. Esposito** Executive Vice President, Chief Strategy Officer

**John Grifonetti** Senior Advisor

**Kurt D. Halvorson** Executive Vice President, Chief Administrative Officer

**Ellen L.S. Koplow** Senior Vice President, General Counsel

**John R. MacDonald** Executive Vice President, Chief Financial Officer and Treasurer

**Anne L. Nelson** Senior Vice President, Chief Marketing Officer

**Vincent Passione** President, Institutional Client Division

**J. Peter Ricketts** President, Private Client Division, Vice Chairman and Corporate Secretary

#### BOARD OF DIRECTORS

J. Joe Ricketts

J. Peter Ricketts

Thomas S. Ricketts

Stephan Pagliuca

C. Kevin Landry

Glenn H. Hutchins

Michael D. Fleisher

Mark L. Mitchell

#### CORPORATE HEADQUARTERS

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