

**Folio Investing Acquires Accounts of BUYandHOLD**  
***Pioneering Brokerage Firm Continues to Expand Retail Business and  
Commitment to Provide DIY Investors with a Smart Alternative to Fad Investing***

McLean, VA – February 19, 2015 - Folio Investing announced today that it has acquired the accounts of the online brokerage firm BUYandHOLD effective February 17, 2015.

For over 15 years Folio Investing has been an innovator in online brokerage services offering retail investors a way to participate in the securities market and achieve meaningful diversification, regardless of account size. The firm has long recognized that do-it-yourself (DIY) investors deserve an alternative approach to fad investing and flash trading. Instead of overwhelming volumes of research or tools that can add risk, customers are offered a blueprint for success – five principles that include diversification, cost reduction, customization, consistent investment, and tax minimization. Only Folio has combined these principles with patented tools that put the DIY investor in a position for long-term success. The BUYandHOLD acquisition reflects Folio’s continued expansion and commitment to providing a smart, cost-effective alternative to “big box” online brokerages.

“We’re delighted to welcome the tens of thousands of BUYandHOLD customers,” said Blaine McLaughlin, vice president, Folio Investing. “As the pioneering brokerage firm that was the first to offer customizable, diversified baskets of securities, we offer unique benefits and features that enable investors to create and manage portfolios that are both cost and time efficient.”

For example, Folio was one of the first brokerages to offer fractional share investing. Its patented system allows investors to diversify by buying and selling the securities they want in the dollar amount they choose, even if that means trading less than a full share. Investors can buy just \$50 of Google, (even though the stock is over \$500 per share), \$50 of Home Depot, and \$50 of Disney. They can also automatically invest \$100—or any amount they want—into the same folio each month.

The company's other innovations include folios, which are virtual baskets containing up to 100 stocks, ETFs, and/or mutual funds. Investors can create as many folios as they want, and buy, sell, or rebalance an entire folio in one transaction, with one click—or trade securities individually.

Folio Investing also offers a wide selection of services and investments, including the Folio Unlimited pricing plan, which offers unlimited accounts, unlimited folios, unlimited access to over 160 pre-made folios, and 2,000 commission-free window trades each month for a flat \$29 monthly fee. Free tax tools, such as 10 automated tax strategies and the patented Tax Football™ provide year-round control over the investment tax impacts in taxable accounts.

These are just a few of the ways Folio Investing supports its five core principles. Through decades of research and experience, these principles have emerged as the keys to long-term investment success.

## **About Folio Investing**

Folio Investing® is the online brokerage where investors can create an unlimited number of diversified investment portfolios, called *folios*, to combine the benefits of direct stock ownership with the convenience of mutual funds. Investors can customize each folio with up to 100 stocks, ETFs, and mutual funds or choose from over 160 free, pre-made Ready-to-Go folios. Diversification is easy and accessible at Folio because investors can trade securities at any dollar amount—even less than a full share. And Folio is the only brokerage to offer flat-fee pricing that includes 2,000 window trades each month for \$29. Investors have the freedom and control to invest as they want and rebalance on a regular basis. Folio also provides patented tax management tools as well as access to private investment opportunities. Financial professionals can leverage these benefits for their clients using the Folio Institutional® platform.

Folio Investing®, Folio Institutional®, and VIAFolio<sup>SM</sup> are offered by FOLIO*fn* Investments, Inc., a self-clearing broker-dealer and a direct member of the Depository Trust & Clearing Corporation (DTCC). FOLIO*fn* Investments, Inc. is a wholly-owned subsidiary of FOLIO*fn*, Inc., which provides investment technology and other services to financial services firms. For more information, please visit [www.folioinvesting.com](http://www.folioinvesting.com) and follow @FolioInvesting on Twitter.