

Folio Investing Acquires More Than 200,000 Brokerage Accounts from LOYAL3

MCLEAN, VA, May 24, 2017 – Folio Investing has acquired more than 200,000 brokerage accounts from LOYAL3, a San Francisco-based online broker-dealer. Folio converted the LOYAL3 accounts to FolioFirst, the new home for LOYAL3 customers, on May 22, 2017.

“We welcome these LOYAL3 customers, and are pleased that we can help them achieve their investing goals,” said Peter Jacobstein, senior vice president of Folio Investing. “This acquisition furthers Folio Investing’s mission of enabling smarter investing, strengthens our presence in the online brokerage space and helps us grow.”

This is Folio’s most recent acquisition. In November 2016, Folio acquired First Affirmative Financial Network, one of the nation’s most prominent RIA firms specializing in sustainable, responsible and impact investing.

Former LOYAL3 customers now enjoy many features common to the Folio Investing retail platform, including:

- Virtually unlimited commission-free trading for a very low monthly fee.
- Dollar-based and fractional share trading so that investors can buy partial shares of securities, and own what they want regardless of the share price.
- Added safeguards such as FDIC protection for account cash.
- Low investment minimums.
- No minimum account balance, and much more.

The terms of the transaction are not publicly available.

About FOLIOfn, Inc.

FOLIOfn, Inc. and its wholly-owned subsidiary Folio Investments, Inc. enable better investing for investors and those who serve them. Together, we provide integrated brokerage, custody and online investing technology innovations to financial enterprises and investment advisors on both a full-service and licensed basis, serving billions of dollars of investor assets nationwide. Folio Investments, Inc. is a self-clearing FINRA broker-dealer and custodian and operates under the brands Folio Investing, Folio Institutional, VIA Folio and FolioFirst.

Media Contact

Kathy King
Chief Communications Officer
T: 703-245-4892
kingk@folioinstitutional.com

©2017 FOLIOfn, Inc. All rights reserved. Securities products and brokerage and clearing services are offered by Folio Investments, Inc., a registered broker-dealer and member FINRA/SIPC.