IMPACT
by InteractiveBrokers

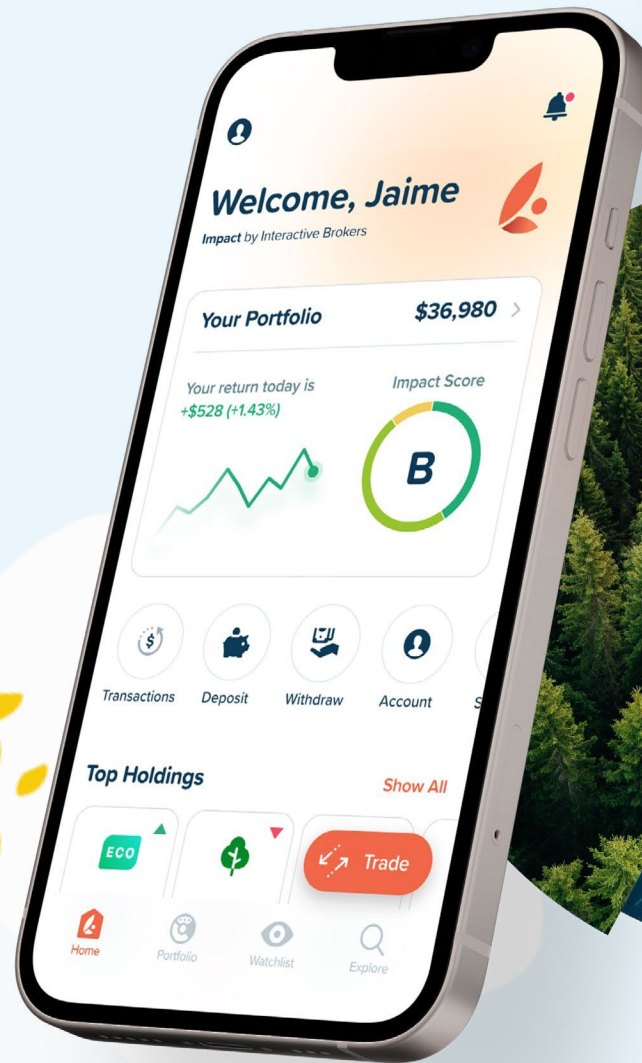# Reviewers Guide

IMPACT is one of the first trading apps of its kind.

IMPACT allows users to seamlessly align their investments with their values, creating a personalized trading experience like no other!
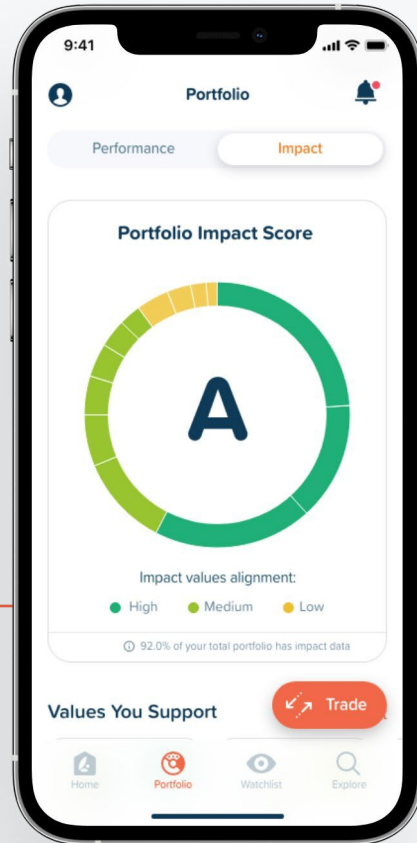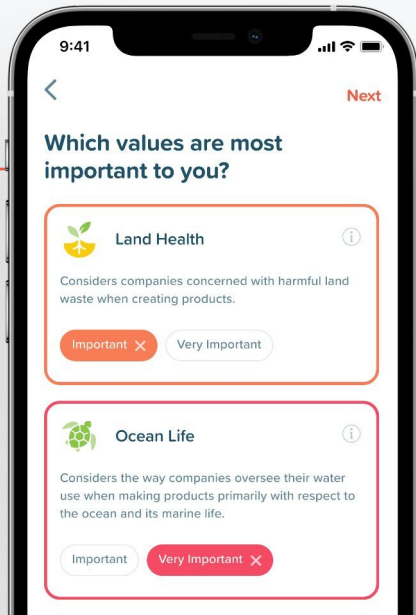
IMPACT stemmed from a desire to bridge the gap between people's values and their investments.

When ESG Director, William Peterffy and ESG Manager, Edward Soffer began this project they envisioned a modern day trading platform that was intuitive to use and opened the world of ESG and sustainability to all investors.
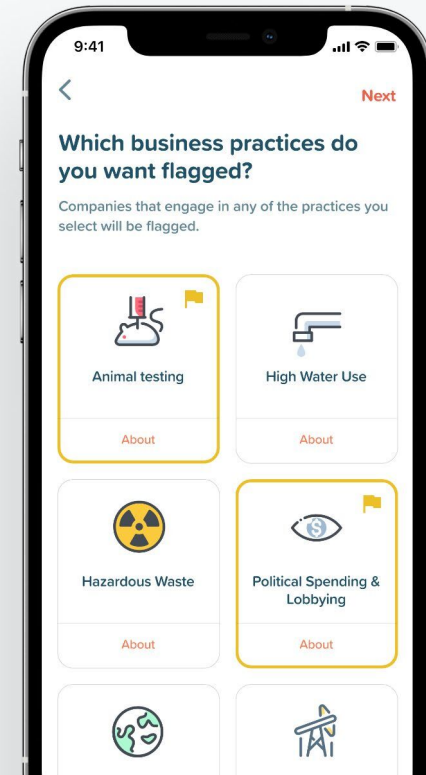
Invest in Your Values

IMPACT by Interactive Brokers asks investors to select their personal investment criteria from **13 impact values**, including Clean Air, Pure Water, Ocean Life, Land Health, Consumer Safety, Ethical Leadership, Gender Equality, Racial Equality, LGBTQ Inclusion, Company Transparency, Sustainable Product Lifecycle, Mindful Business Models and Fair Labor & Thriving Communities.

Clients can also **flag investments** based on 10 categories: animal testing, business ethics controversies, corporate political spending and lobbying, energy-intensive, fossil fuels, greenhouse emissions, hazardous waste, high water usage, tobacco, alcohol and gambling, and weapons and gun manufacturers.

Based on these selections, the app provides **impact scores** on existing portfolios and holdings, and also identifies companies that rank highly in these categories.
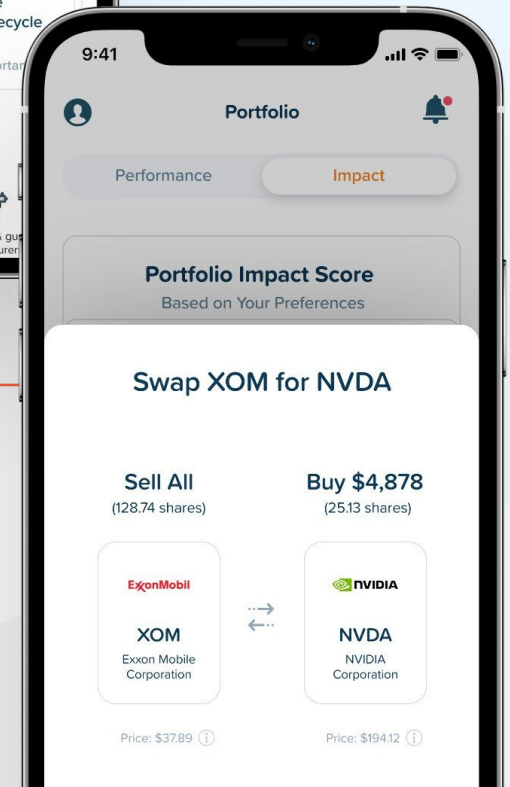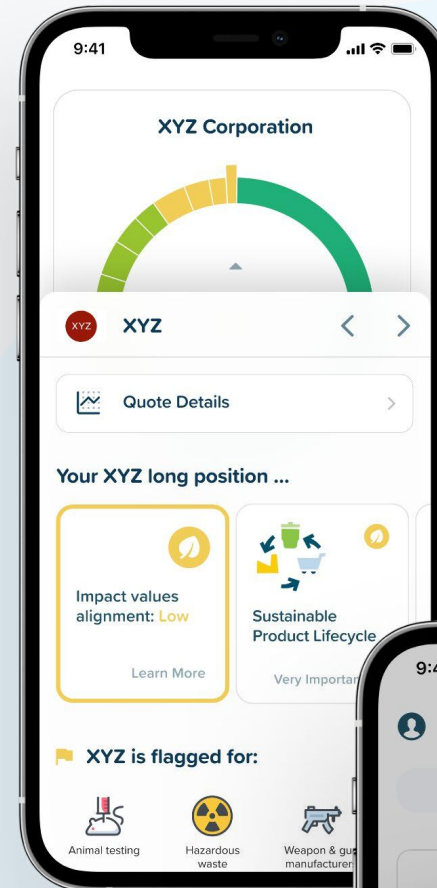
Not Your Average Trading App

In addition to financial performance of stocks, the app offers the ability to examine companies' impact scores by providing relevant news and allowing users the ability to improve their scores through the selection of companies that match their values more closely.

Beyond empowering conscious investors to easily create portfolios that reflect their values, the IMPACT App is unique in offering the ability to swap positions in the same dollar amount from one security to another via its '**Swap**' feature. With one tap, clients can buy and sell securities simultaneously based on the comparative impact scores of one company versus another. IMPACT is one of the first trading apps to offer this capability.

IMPACT allows users to invest in a better tomorrow. They can now invest responsibly and secure their future while positively impacting our planet and society!

Key Features

Portfolio Scoring and Value Alignment Tool: lets users select their personal value preferences and then allows them to see how much their financial investments aligns with what matters the most to them.Users are also provided with a list of securities that allows them to constantly improve their alignment and scores.

Simulated Trading: allowing users to easily sign up and test the app with virtual money prior to opening an account.

Swap: a unique offering that gives users the ability to swap positions for the same dollar amount from one security to another.

Charitable Giving: Make cash donations to nonprofits directly from the app. (Available to U.S. clients only). This feature allows users a customizable donor experience by zooming in on charities that align with their personal values.

Guided Investing Experience: IMPACT provides access to off the shelf Socially Responsible Investment portfolios from Interactive Brokers' robo advisor.

Cryptocurrency: Investors will have access to cryptocurrency trading via Paxos Trading Company. (Available to U.S. clients only)

Zero commissions on U.S. stock trading for U.S. clients.

Plant a Forest: Interactive Brokers has partnered with One Tree Planted and will plant 25 trees For every $1,000 dollars an investor deposits in their account. (Available to the first 30,000 customers who sign up for IMPACT).

Incentives: users can get rewards for Amplifying their IMPACT (referring friends) and have an opportunity to get IMPACT Shares (granting of Interactive Brokers stock).

IMPACT

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