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Folio Investing and Folio Institutional Offer A Way to Trade NextShares™

Advisors, institutions and individual investors can trade these new exchange-traded managed funds through Folio's powerful brokerage platform.

MCLEAN, VA, February 26, 2016 –[Folio Institutional](#) and [Folio Investing](#) welcome financial advisors, institutions and their clients to the first brokerage platform where NextShares exchange-traded managed funds (NextShares) may be traded. NextShares will be available on February 29, 2016.

“FOLIO*fn* Investments is the first broker-dealer where NextShares may currently be traded. Our corporate culture, robust platform, and pioneering technology made it possible for this new way to invest in actively managed strategies,” said Steven M.H. Wallman, CEO of FOLIO*fn*, Inc. Wallman, a former SEC Commissioner, founded the Folio companies in 1999. “The Folio brokerage platform provides leading-edge solutions, such as patented tax management tools and commission-free window trades. Folio makes investing easy and cost effective, and is proud to pioneer the offering of NextShares.”

For more than 15 years, **Folio Institutional** has been a comprehensive one-stop solution for registered investment advisors, combining clearing, custody and a broad array of innovative technology services into a formidable offering. Its patented, web-based investing system enables advisors to grow and adapt to clients' evolving demands without the high cost of additional resources. Folio Institutional currently has more than 400 advisor firm relationships, ranging from global firms to high growth start-ups.

Folio Investing also offers individual investors easy-to-use online tools, such as its [Ready-to-Go Folios](#), [Tax Football™](#), and [dollar-based investing \(using fractional shares\)](#) that empower them to invest smarter. With a few clicks of the mouse, Folio Investing customers can create a diversified portfolio and manage it for the long term. Folio Investing does not require any investment or balance minimum, and offers commission-free pricing, which means investors can pay less and invest more.

“We are pleased to partner with Folio to make NextShares available to investors,” said Stephen W. Clarke, President of NextShares Solutions LLC. “Folio's support of this initiative demonstrates their commitment to providing leading-edge investment solutions that can help clients achieve their goals.”

About Folio Investing and Folio Institutional

Folio Institutional® is a leading investment solutions and financial technology company. Folio offers an integrated brokerage and custodial platform featuring patented, state-of-the-art trading, portfolio management tools, and private placement capabilities. It supports financial professionals and institutions on both a full-service and technology-licensed basis. With access to proven, highly scalable, online brokerage and investing solutions, professionals can efficiently maintain diversified portfolios of public and private securities, retain hands-on control over investments, manage tax liabilities, efficiently rebalance portfolios, produce reports, promote compliance, and take many other actions.

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, which 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 Institutional®, Folio Investing®, and VIA Folio™ are offered by FOLIO*fn* Investments, Inc., a self-clearing broker-dealer and a direct member of the Depository Trust & Clearing Corporation (DTCC). Launched in 2000, FOLIO*fn* Investments, Inc. is a wholly-owned subsidiary of FOLIO*fn*, Inc., which provides investment technology and other services to financial services firms.

About NextShares Solutions

NextShares Solutions LLC is a wholly owned subsidiary of Eaton Vance formed to develop and commercialize NextShares. Aspects of the operation of NextShares are protected intellectual property owned by NextShares Solutions. For more information, visit nextshares.com.

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