

# Investment Club, Partnership or Limited Partnership Account Opening Instructions

## Required Forms and Agreements

Please print legibly – do not use correction fluid or cross out information.

### 1) Brokerage Account Application

- **Applicant** – Investment Club or Partnership’s information.
- **Co-Applicant** – Member or Partner Trader’s information.
- **Signatures** – Member or Partner Trader signs as Co-Applicant.

### 2) Brokerage Account Agreement

Before signing the Application, read the Agreement and retain a copy for your records. You do not need to return this document.

### 3) Privacy Statement

Please read this document and retain a copy for your records. You do not need to return this document.

### 4) Partnership Certification

Must be signed by all General Partners

-OR-

### Investment Club Certification

Must be signed by all Current Members.

## Additional Documentation

The documents listed below are most commonly used, but requirements vary by state. Please contact your local branch office for state-specific information and acceptable alternate documentation.

- For an Investment Club, a copy of the clients Investment Club Agreement signed by all Current Members.
- For a Partnership or Limited Partnership, a copy of the client’s Partnership Agreement signed by all General and Limited Partners.

## Available Account Features

Restrictions may apply; contact your local branch office to confirm eligibility.

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|---|--|
| <input checked="" type="checkbox"/> <b>Account Linking</b>          | <input checked="" type="checkbox"/> <b>Options Trading</b>       |
| <input type="checkbox"/> <b>Bank Deposit Program</b>                | <input type="checkbox"/> <b>Scottrade Bank Account</b>           |
| <input checked="" type="checkbox"/> <b>Margin</b>                   | <input type="checkbox"/> <b>TOD Beneficiary Plan</b>             |
| <input type="checkbox"/> <b>Online Money Direct® Deposits (ACH)</b> | <input checked="" type="checkbox"/> <b>Trading Authorization</b> |