

Traditional IRA, Rollover IRA or SEP IRA Account Opening Instructions

Required Forms and Agreements

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

1) Brokerage Account Application

- **Applicant** – Individual's information.
- **Co-Applicant** – Co-Applicants are not allowed for Traditional, Rollover or SEP IRAs.
- **Signatures** – Individual must sign.

Note: Make sure you complete page 2 of the application.

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) Traditional IRA Agreement and Disclosures

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

4) Privacy Statement

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

Scottrade
BROKERAGE ACCOUNT APPLICATION

Applicant
Information about the primary account holder - depending on the account type, this may be the minor, protected person, or organization (trust, corporation, partnership, etc.)

Co-Applicant
Information about the secondary account holder - depending on the account type, this may be a custodian, trustee, trading officer/partner, or other authorized representative.

Individual must complete this section.

Co-Applicant's not allowed for Traditional, Rollover or SEP IRAs.

Individual's signature **Leave blank**

Leave blank **Leave blank**

Registered Principal

Available Account Features

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

- Account Linking**
- Bank Deposit Program**
- Trading Authorization**
- TOD Beneficiary Plan**

- Options Trading**
- Scottrade Bank Account**
- Margin**
- Online Money Direct® Deposits (ACH)**