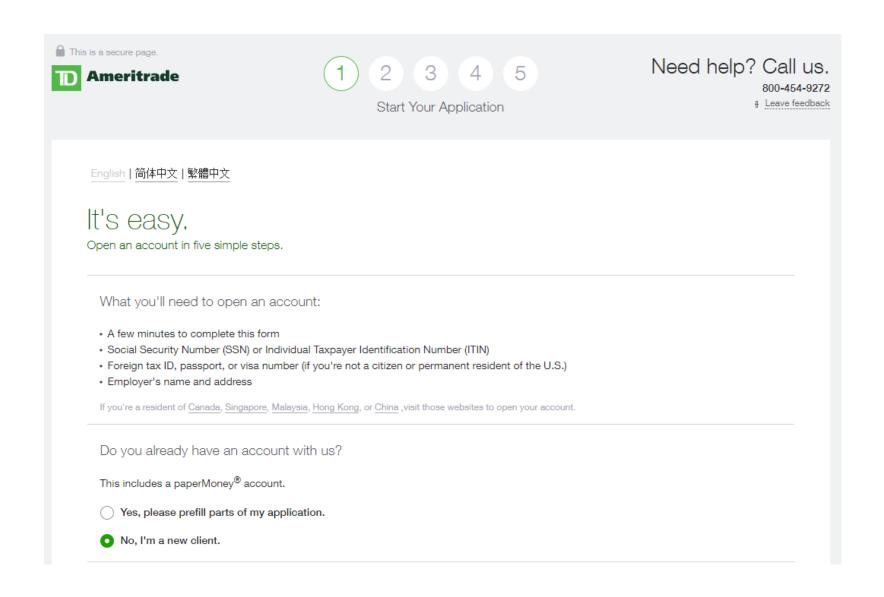
TD Ameritrade – Open a New Account Redesign



TD Ameritrade – Open a New Account Redesign

What type of account do you want to open?

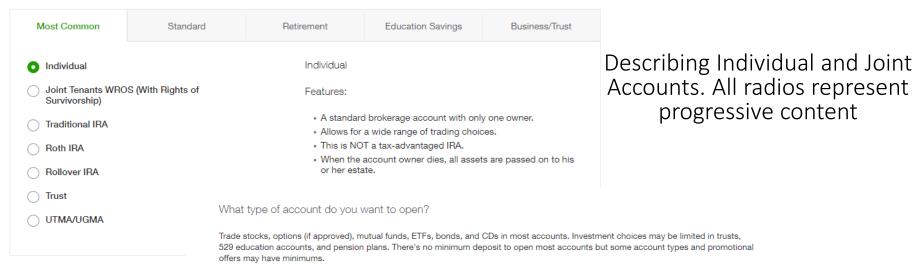
Trade stocks, options (if approved), mutual funds, ETFs, bonds, and CDs in most accounts. Investment choices may be limited in trusts, 529 education accounts, and pension plans. There's no minimum deposit to open most accounts but some account types and promotional offers may have minimums.

Individual Joint Tenants WROS (With		Individual					
		Individual					
Survivorship)	Rights of	Features:					
Traditional IRA		 A standard brokerage account with only one owner. Allows for a wide range of trading choices. This is NOT a tax-advantaged IRA. 					
Roth IRA							
Rollover IRA		 When the account owner dies, all assets are passed on to his or her estate. 					
Trust							
UTMA/UGMA							

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Most Common Standard Retirement Education Savings Business/Trust Joint Tenants WROS (With Rights of Survivorship) Individual Joint Tenants WROS (With Rights of Features: Survivorship) . An account with two or more adult owners. Traditional IRA · Each account owner has an undivided interest in the assets. . When one account owner dies, the surviving account Roth IRA owner(s) retain(s) the rights to the entire account. Rollover IRA Eligibility: ○ Trust · Joint Tenants WROS is not a recognized form of property UTMA/UGMA ownership in Louisiana.

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Most Common	Standard	Retirement	Education Savings	Business/Trust		
Individual Joint Tenants WRO	S (With Rights of	Trust Features:				
Survivorship) Traditional IRA		trust. A tru	With this type of account, the account owner is an entity, a trust. A trustee manages the assets. The account of the account owner is an entity, a trust.			
Roth IRA Rollover IRA		which incl	 TD Ameritrade offers accounts for legally established trusts, which include, but are not limited to, living, revocable, irrevocable, and testamentary trusts. 			
• Trust		Eligibility:				
O UTMA/UGMA		 To open a applicatio 	ounts cannot be opened onlin trust account, please print ar n and send it back to us alon ust Summary.	nd complete the trust		

TD Ameritrade Open a New Account Trust and UTMA/UGMA accounts, all radios represent progressive content

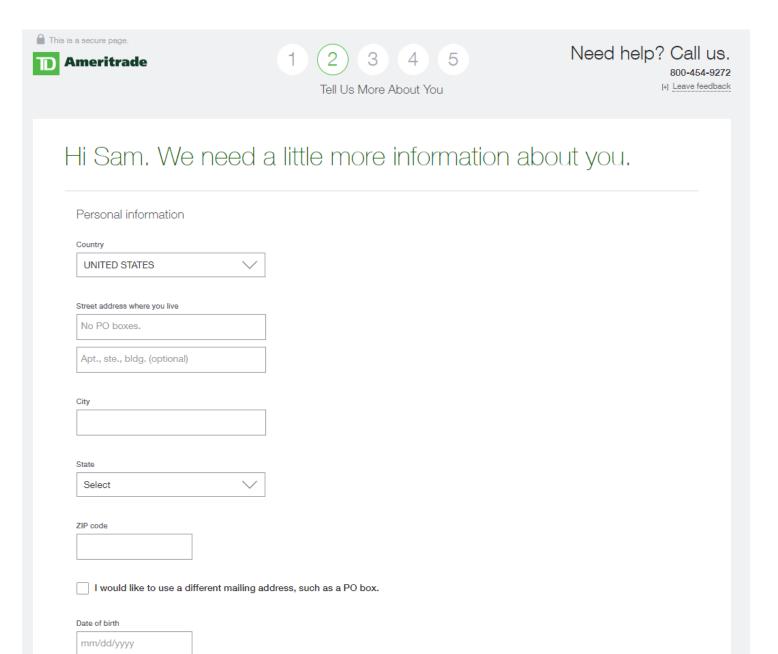
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Trust and UTMA/UGMA accounts. All radios represent progressive content

Most Common	Standard	Retirement	Education Savings	Business/Trust		
Individual Joint Tenants WROS (With Rights of Survivorship) Traditional IRA Roth IRA Rollover IRA Trust UTMA/UGMA		Features: • Uniform Tr Minors Ac by an adul benefician; • All assets (18 to 25, beneficiar) • Gifts and t withdrawa minor. • Custodial	 Uniform Transfers to Minors Act (UTMA) and Uniform Gifts to Minors Act (UGMA) accounts are custodial accounts set up by an adult (the custodian) on behalf of a minor (the beneficiary). All assets transfer to the beneficiary at the age of termination (18 to 25, depending on the state). At that time, the beneficiary can use the funds as desired. Gifts and transfers to minors are irrevocable. You can make withdrawals from the account only for the benefit of the minor. Custodial accounts are not tax-deferred. Taxation of earnings will depend on the minor's tax rate. 			
		or her stat • Any adult of the minor!	dian must have reached the e of residence. can be the custodian, even s s parent or guardian. must be a U.S. citizen or pe	someone who is not		

TD Ameritrade – Personal Information



Personal affiliations

 Are you, or is your spouse, or is any member of your <u>immediate family</u> living in the same household licensed by, employed by, or associated with a <u>broker-dealer firm</u>, a financial services regulator, a securities exchange, or a member of a securities exchange?



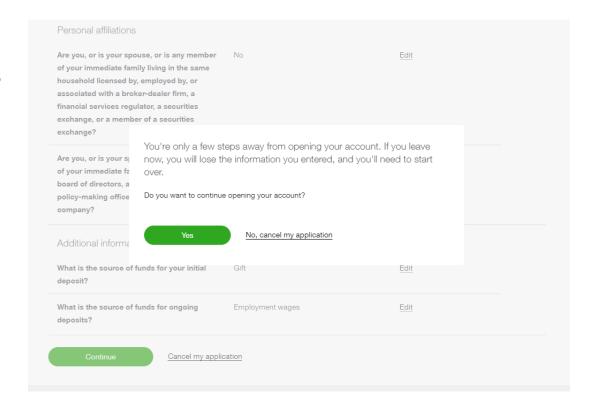
A person, company, or organization (other than a bank) that buys or sells securities on its own behalf or for others, and is registered with the Securities and Exchange Commission.

TD Ameritrade – Personal Affiliations

Are you, or is your spouse, or is an Exchange Commission.
 shareholder, or a policy-making officer of a publicly traded company?



TD Ameritrade – Cancel Message



member of the board of directors, a 10%