



Coverdell ESA Opening Instructions

Conditions to Open the Account:

- No margin.
- Options are limited to covered calls only.

Required Forms:

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

- **Coverdell ESA Application** – The application must be signed by the responsible individual. If the depositor and the responsible individual are two different people, Scottrade requires both signatures on the application.
- **Coverdell ESA Agreement & Disclosures** – Read the Agreements and Disclosures before signing the Application and retain a copy for your records. You do not need to return this document.
- **Brokerage Account Agreement** – Read before signing the Application and retain a copy for your records. You do not need to return this document.