Scottrade®

Inherited IRA
Opening Instructions

Conditions to Open the Account:

- No margin.
- In the community property states of AZ, CA, ID, LA, NM, NV, TX, WA and WI, the spouse needs to sign the spousal consent section on page 2 if he/she is not the only primary beneficiary.

Required Forms:

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

- **Inherited IRA Application** – Please complete and sign this form.
- **Brokerage Account Agreement** – Read before signing the Application and retain a copy for your records. You do not need to return this document.

Additional Documents:

- If the beneficiary is an estate, a copy of the court-appointed letter naming the executor must be provided.
- If the beneficiary is a trust, a Scottrade Trust Certification form must be provided.
- If the beneficiary is an entity, a corporate resolution must be provided listing all officers authorized to act on behalf of the entity.
- Death certificate if the deceased has a Scottrade account.
- Contra firm statement if the deceased's account is at another firm.