



Investment Club/Partnership Account Opening Instructions

Conditions to Open the Account:

- A maximum of three members may be authorized to trade on the account.
- A Federal Tax ID is required to open this type of account

Required Forms:

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

- **Brokerage Account Application** – This form may be signed by up to three members/partners authorized to trade on the account.
- **Brokerage Account Agreement** – Read before signing the Application and retain a copy for your records. You do not need to return this document.
- **Partnership Agreement** – All participants must sign, except in the case of a Limited Partnership in which all general partners must sign.
- **Investment Club Agreement**

Additional Documents:

- A copy of the client's partnership agreement signed by all partners.