



Trust Account Opening Instructions

Conditions to Open the Account:

- Account is eligible for margin & option privileges if granted by the trust.
- For testamentary trusts a copy of a death certificate is required.
- Scottrade reserves the right to ask for a copy of the trust, but does not require one for the opening of the account.

Required Forms:

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

- **Brokerage Account Application** – All trustees must sign.
- **Brokerage Account Agreement** – Read before signing the Application and retain a copy for your records. You do not need to return this document.
- **Trust Account Certification** – All trustees must sign.
- **Corporate Account Certificate**– Only required if the trustee is a bank or financial institution. (In lieu of the Corporate Account Certificate please provide your bank's corporate resolution.)