

NEW ACCOUNT CHECKLIST

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Please note that the following items will be needed to complete your application.

CUSTODIAL: IRREVOCABLE LIFE INSURANCE TRUST, PENSION PLAN, PROFIT SHARING PLAN, OR 401(K) PLAN

- W-9 Form
- Form SS-4 to verify Tax Identification Number matches Plan/Trust Name
- Plan/Trust Documents and/or Adoption Agreement (if applicable) including:
 - Legal Plan/Trust Name and Effective Date
 - Name(s) of Trustee(s), Insurer(s), Administrator(s) and/or Custodian
 - Power or authority of the Trustee(s) to invest Plan/Trust Assets
 - Vesting requirements (if applicable)
 - Submitted Plan/Trust Documentation must include the signature page of the Plan/Trust
- Copy of a Valid Government Issued Photo Identification for two (2) authorized signers
 - Drivers License
 - State Issued Identification or
 - Passport
- Custodial Account Application

CUSTODIAL: UTMA/UGMA ACCOUNT

- W-9 Form for the Minor (executed by the Guardian)
- Copy of Social Security Card for Minor
- Copy of a Valid Government Issued Photo Identification for Guardian
 - Drivers License
 - State Issued Identification or
 - Passport
- Custodial Account Application