

## Account Transfer Form (Non-IRA Accounts)

E\*TRADE Securities, Inc. P.O. Box 8160 Boston, MA 02266-8160

Questions? E-mail us through www.etrade.com or call 1-800-STOCKS-5 (1-800-786-2575) 24 hours a day, 7 days a week.

 $\frac{Please\ include\ a\ copy\ of\ your\ most\ recent\ statement}{reverse\ for\ additional\ instructions.})\ If\ you\ are\ transferring\ an\ IRA\ or\ retirement\ account,\ please\ complete\ E*TRADE's\ Retirement\ Account\ Transfer\ Form.}$ 

A Information about your account  (current customers only)  Important: Registration must be identical to the registration on the account you are transferring. (See back of form for instructions on transferring accounts with different registrations.)								
	ion on the account you are tr	ransferring. (See back o	f form for instruction	ns on transfe	rring accounts v	with differen	t registrations.)	
Account Holder Name (first, middle initial, last)			E-mail Address					
Address		Social Security Number		Hon	Home Phone			
City State/Province		ZIP/Postal Code/Country		Bus	Business Phone			
Information about the account you are transferring:								
Name of Firm Account Number				Phone	Phone			
Address		City		State/Prov	State/Province Zip/Postal Code/Country		ode/Country	
Type of account you are transferring:	1							
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	er (non-IRA)							
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B   If you are transferring from	a brokerage fir	m, please cor	nplete: (Attac	h additiona	al pages if nec	essary.)		
You must choose one (if nothing is marked, all assets		•	-					
☐ Transfer all the assets in my account. (If you		need to complete the ren	nainder of this section	n.)				
Transfer only those assets listed below: (Att		•						
	7.0	<u> </u>		Socurities	Securities Description			
Quantity Securities Descri	hrion	Quantity	ļ	Securiues	Describition			
C   If you are transferring from	a mutual fund co	ompany, pleas	e complete:	(Use a sepa	rate form for e	ach fund yo	ou transfer.)	
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## To the Investor: Instructions for Transferring Your Account

To transfer your account to E\*TRADE® from another brokerage firm, mutual fund company, bank, or life insurance company, simply:

- Complete and sign the Account Transfer Form.
- Attach a copy of your most recent statement from the delivering firm.
- If this is a new account, complete an E\*TRADE® Account Application.
- Send all paperwork to E\*TRADE® Securities Inc., Transfer of Account Dept., P.O. Box 8160, Boston, MA 02266-8160.

Note:

Most full account transfers take from three to six weeks, depending on the processing time of the delivering firm. If you are opening a new account and would like to begin using your E\*TRADE account right away, please include an initial deposit (\$1,000 minimum for cash accounts; \$2,000 minimum for margin accounts) with your application.

## Additional Requirements:

**If you are transferring from a joint account to an individual account,** both joint account holders must sign the Account Transfer Form. Additionally, the delivering firm requires a notarized letter of authorization signed by both joint account holders, authorizing the transfer.

If you are transferring from an individual account to a joint account, both joint account holders must sign the Account Transfer Form. Additionally, the delivering firm requires a letter of authorization from the individual account holder.

If you are transferring from an account that is not identically registered to the E\*TRADE® account, the delivering firm requires a notarized letter of authorization.

If you have any questions, please contact E\*TRADE® through www.etrade.com or call 1-800-STOCKS-5 (1-800-786-2575).

**Delivery Instructions** 

Name and Address: E\*TRADE Securities, Inc. Tax ID number: P.O. Box 8160 77-0116489

Boston, MA 02266-8160

All DTC-Eligible Securities: Deliver to DTC Clearing 0385, Code 40

Checks: E\*TRADE Securities, Inc.
Attn: Cashiering Department

P.O. Box 8160

Boston, MA 02266-8160

**Dividend Reinvestment:** Issue a certificate for all whole shares, liquidate all fractional shares,

and discontinue dividend reinvestment

Physical Delivery of Securities: E\*TRADE Securities, Inc.

P.O. Box 8160

Boston, MA 02266-8160

**Book-Entry GNMA Securities:** BKNYC/ETG/ETRADE SECURITIES

Fed-Entry Securities: 021000018 BK OF NYC/ETRADE

(e.g., Treasury notes)

Fed-Wired Monies: The Bank of New York

ABA #021000018

FBO: E\*TRADE Securities, Inc.

AC #8900346256

For further credit to: [customer name and E\*TRADE account number]

Options Delivery Instructions: Options Clearing Corp.

0385

All deliveries must include account holder name and E\*TRADE® account number.