

Open a Joint Account

Maximize your investments with a joint account that combines brokerage, money market and custody accounts to give you a complete investment portfolio. This account allows you to buy and sell securities such as; stocks, bonds and commodities, while earning on your money market balances.

Opening a Joint Account

Before completing this form be sure to have a proof of ID e.g. a scanned photo of your ID, proof of address e.g. a copy of a recent utility bill or bank statement. Additionally if you are a citizen of the United States you'll need to complete the W9 and FATCA forms.

Select the number of account holders

- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

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