

ACCOUNT TRANSFER FORM

TO TRANSFER YOUR EXISTING ACCOUNT TO TD AMERITRADE

Account # 569820020 Advisor Code 509820020 Case #

PLEASE ATTACH A COPY OF YOUR LATEST STATEMENT.

Social Security NumberTax ID:			Clearing Number	
	534555) 9		0188
☐ Individual (Non-Qualified)	Personal Trust	Limited Liability Company	Roth IRA	Qualified Retirement Plan Employer Plan Type:
Joint	□Estate	Partnership/Investment Club	SEP IRA	☐ Simple IRA
□UTMA/UGMA	Corporate	☐ Traditional IRA/Rollover IRA	☐ Coverdell ESA	□ Beneficiary IRA
Other:				
INFORMATION	N ON THE ACCOU	JNT YOU ARE TRANSFER	RING FROM	
Account Title/Regist	ration as shown on your	statement	Account Number	
Name of Delivering	dley 1 Soto		5628	5552
AC)P			
Physical Address of 2599 PI		20	Telephone Number	(required)
	T. M.	once, Floor mins, NY,	18/27 (541) 754-1020.
☐ Individual (Non-Qualified)	Personal Trust	Limited Liability Company	Roth IRA	Qualified Retirement Plan
Joint	□Estate			Employer Plan Type
	Listate	Partnership/Investment Club	SEP IRA	☐ Simple IRA
				Has SIMPLE IRA been funded for at least two year
☐UTMA/UGMA	Corporate	☐ Traditional IRA/Rollover IRA	☐ Coverdell ESA	
Other:			- coverden ESA	Beneficiary IRA
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