

Instructions for Submitting Your Account Application

1. Select the application type depending on the type of account you're planning to open.
2. Read your Client Relationship Summary and Brokerages Services Disclosure Summary, and, if this is an IRA application, make sure you have read the applicable IRA Agreement on the Disclosure Page.
3. Print the application, complete all relevant client information, and sign your account application.
4. Make yourself a copy of the application for your records.
5. Attach legible and unexpired copy of your government issued photo-identification, such as a driver's license or passport, to your application. Your account cannot be opened without it.
6. Include any initial deposit check.
7. Mail your application with original signature, copy of photo-ID, and any additional paperwork to:

CUSO Financial Services, L.P.
10150 Meanley Drive, 1st Floor
San Diego, CA 92131
858-530-4400
8. About 1-2 days after we receive and approve your application, we'll send you an email with instructions on how to create your User ID and Password online.