Transferring from an existing investment account:

When you reach the signature portion of the account opening process, you will be asked to provide:

- a copy of your current account statement
- the name, address, and phone number of the firm you are transferring the account from
- your current account number

You will also provide:

- Firm name the account is transferring from
- Firm address the account is transferring from
- Firm phone number
- The account type must match the account being transferred (i.e. IRA to IRA)

Please note that not all firms accept e-signature Transfer Forms. Your advisor may have you sign hard copy Transfer Forms as an alternative.

Transferring from your bank account:

When transferring from your bank account you will need to provide your:

- Name on Bank Account
- Bank Name
- Bank Account Number
- Bank Routing Number

Opening your account via check:

- Make the check out to "TD Ameritrade FBO (client name)"
- Your newly established account number should be written on the check
  - You can obtain your account number by calling CLS Investments at 888-455-4244 or emailing our service team at ClientServicesTeam@clsinvest.com.
- Mail your check to:

  TD Ameritrade
  5010 Wateridge Vista Drive
  San Diego, CA 92121

Opening your account via rollover:

- Complete the rollover requirements at the originating firm with your financial advisor.
- Check must be made out to "TD Ameritrade FBO (client name)"
- Write your newly established account number on the check.
  - You can obtain your account number by calling CLS Investments at 888-455-4244 option 2 or emailing our service team at ClientServicesTeam@clsinvest.com.
- Mail your check to:
  TD Ameritrade
  5010 Wateridge Vista Drive
  San Diego, CA 92121