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Completed on :

Completed on : May, 29, 2026 03:59 PM ET

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24 hours a day, 7 days a week

Application status:

Account type:

Account Number:

Confirmation Number:

Primary account owner:

Co-applicant:

Account Features

Margin

Debit Card Check writing

## Review the Client Relationship Summary & Best Interest Disclosure

Before you can continue, you must open and review each of these documents. Select the links to review each item, or **print** and **save** copies for your records. These are important documents that provide information about the scope and terms of the services we provide to clients. To review these documents in PDF format, you must have Adobe Reader 6.0 or higher. You can download for free at Adobe Acrobat Reader.

[Client Relationship Summary \(PDF\)](#)

[Best Interest Disclosure Statement \(PDF\)](#)

Agreements & Disclosures

Please review the following disclosures and agreements. For your records, an email with a link to these agreements and disclosures will be sent to you. You can also request printed copies of the agreements and disclosures from the Merrill Edge representative assisting you. Please retain the email and printed or electronic copies of the agreements and disclosures for your records. Consenting to the Electronic Communications Disclosure allows us to provide you with the next set of agreements and disclosures electronically.

Merrill Edge Self-Directed Electronic Communications Disclosure

### Taxpayer Certification

By agreeing to the Tax Certification Form you certify that the tax information you are providing is accurate.

Agreements & Disclosures

Merrill Edge Self-Directed Brokerage Account Documents, Privacy Notice, Affiliate Marketing Notice and Business Continuity

I hereby agree to these terms and conditions by checking this box.

Sign & Submit Agreement

The Internal Revenue Service does not require my consent to any provisions of this document other than the certifications required to avoid backup withholding.

### Taxpayer Certification

**By signing below, you represent and agree that:**

Provide Your Signature

- To sign and agree to the above conditions, I, enter a symbol of my signature by checking this box.

[Legal Information](#) [Privacy](#) [Security](#) [Software Requirements](#) [Accessible Banking](#) [Mutual Fund Investing Pamphlet \(PDF\)](#) [ATM Locator Fees \(PDF\)](#)

[Financial Information](#) [Routing & Executions](#) [Business Continuity](#) [Deposit Account & Money Fund Rates \(PDF\)](#) [Client Relationship Summary \(Form CRS\) \(PDF\)](#)

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