

Completed on : November, 22, 2024 07:32 PM ET

Account type:

Primary account owner:

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 \(PDF\)](#)

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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

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Sign & Submit Agreement

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