

Refer to the tables below to determine if Freedom Advisor's digital "Open New Account" is available for the type of account at your custodian. Opening the account on our platform is the fastest way and eliminates errors and delays by using a guided workflow that auto-fills client information for existing clients and prospects.

- If the account type is available in "Open New Account," then it **must** be opened on the platform.
 - You can still choose to have clients sign the completed documents manually.
- For account types not available in "Open New Account," fill in the forms and either submit via the DocuSign link or a manual signature. We have provided links below to a consolidated file that contains all required documents per account type.

Account types available for digital "Open New Account"¹

Enter your client's information for these account types directly in Freedom Advisors [here](#). This enables the creation of a new account and its funding. Note that an Investment Plan must be created in the platform and signed by the client(s) before the account can be invested.

Goldman Sachs:

Available Digitally in Open New Account	
Individual	Contributory IRA
Joint - Right of Survivorship	Roth IRA
Joint - Tenants in Common	IRA Rollover
Joint - Community Property	SEP IRA
Joint - Tenants by Entirety	SIMPLE IRA

Charles Schwab:

Available Digitally in Open New Account	
Individual	Contributory IRA
Joint - Right of Survivorship	Roth IRA
Joint - Tenants in Common	IRA Rollover
Joint - Community Property	SEP IRA
Joint - Tenants by Entirety	SIMPLE IRA

¹ No Fidelity accounts are available for the Digital "Open New Account" process; see below for links to account opening forms

Account Types Not Available Digitally in “Open New Account”

Use the below links to open accounts that cannot be opened digitally. An Investment Plan must be created in Freedom Advisors before the account can be invested. Follow the instructions in the document for how to submit them once completed.

Goldman Sachs:

Account Type	Custodial and Freedom Advisors Forms		
Trusts (Revocable & Irrevocable)	Co-Adviser	Ausdal	Adviser
Corporations, LLCs, Partnerships, and Proprietorships	Co-Adviser	Ausdal	Adviser
Qualified Retirement Plan, Defined Benefit Plan, Pension Plan	Co-Adviser	Ausdal	Adviser
Custodial (UGMA/UTMA)	Co-Adviser	Ausdal	Adviser

Charles Schwab:

Account Type	Custodial and Freedom Advisors Forms		
Trusts (Revocable, Irrevocable, Testamentary or Business)	Trust Account Application	Co-Adviser	Adviser
Corporations (S or C)	Corporate Account Application	Co-Adviser	Adviser
Qualified Retirement Plan	Contact Us		
Inherited IRA	Inherited IRA Accounts	Co-Adviser	Adviser
Custodial (UGMA/UTMA)	Custodial (UGMA/UTMA)	Co-Adviser	Adviser

Fidelity Investments:

Account Type	Custodial and Freedom Advisors Forms		
Taxable Accounts (Individual, Joint, Estate, Custodial)	<u>Personal Account Application</u>	<u>Co-Adviser</u>	<u>Adviser</u>
IRAs (Traditional, Rollover, Roth, SEP)	<u>IRA Application</u>	<u>Co-Adviser</u>	<u>Adviser</u>
Inherited IRA	<u>Inherited IRA</u>	<u>Co-Adviser</u>	<u>Adviser</u>
Trusts	<u>Trust Account Application</u>	<u>Co-Adviser</u>	<u>Adviser</u>
Corporation, LLC, Partnerships, Proprietorships	<u>Corporate Account Application</u>	<u>Co-Adviser</u>	<u>Adviser</u>
Qualified Retirement Plan	<u>Qualified Retirement Plan</u>	<u>Co-Adviser</u>	<u>Adviser</u>

MT-616794