

Instructions for Use of the Supplemental Account Application for Trusts as Tenants in Common

In order for this account to be opened correctly and as efficiently as possible, please follow this process:

- Complete and sign the [Supplemental Account Application for Trusts as Tenants in Common](#).
- Each Trust, whose assets will be combined in this single TD Ameritrade Trust Account, must fill out a [TDA 4286 Trust Account Application](#).
- Gather all documents (the Supplement and Trust Account Applications) and submit them to TD Ameritrade as a single packet.

Note: If all documents are not submitted together, these forms may be inadvertently processed as two separate trust accounts.

Please do not return this instructional page / checklist back to TD Ameritrade.

Supplemental Account Application for Trusts as Tenants in Common



Return Options:

Electronically via Message Center:

Log in and go to Client Services > Message Center to attach the file

Regular Mail:

PO Box 2760, Omaha, NE 68103-2760

Overnight Mail:

200 South 108th Avenue
Omaha, NE 68154-2631

Fax: 866-468-6268

Questions? Call a New Accounts representative at 800-276-8746.
Please visit us at www.tdameritrade.com for more information about opening an account.

Trustees

List the Trusts whose assets will be commingled in a single TD Ameritrade Trust Account. TD Ameritrade will use the address of the Primary Trust as the mailing address of this account, and the Tax Identification Number (TIN) of the Primary Trust for tax reporting on this account.

Type or print title of Primary Trust _____

Type or print title of Secondary Trust _____

The Trustees signing this Supplemental Application all agree and affirm that:

1. They are duly authorized by the provisions of their respective Trusts and Trust Agreements to enter into this Supplemental Account Application for Trusts as Tenants in Common.
2. The respective Trusts and Trust Agreements explicitly permit their assets to be commingled and to be held in a single brokerage account registered as Trusts as Tenants in Common.
3. TD Ameritrade does not provide any legal or tax advice and the Trustees have consulted with their attorneys and/or tax advisors and have determined that their applicable state laws permit the assets in the Trusts to be held in a single brokerage account registered as Trusts as Tenants in Common.
4. We instruct TD Ameritrade to use the Taxpayer Identification Number of the Primary Trust listed above as the TIN for the Account. All tax reporting for the Account shall be done under this TIN. We agree that TD Ameritrade is not responsible for any tax consequences incurred by the Trusts as a result of all activity being reported under the aforementioned Primary Trust's TIN.
5. They are responsible for maintaining records of the percentage of ownership each Trust has in the Account and agree that TD Ameritrade is not responsible for determining each Trust's ownership percentage in the Account either at Account open or at any time thereafter.
6. The Trusts are revocable living trusts and all of the Trustees for the Trusts are signing this Supplemental Account Application.
7. The Account shall be titled as (e.g. "John Smith Revocable Trust and Mary Smith Revocable Trust held as TIC"):

(Note: the registration may be abbreviated to accommodate character limitations.)



Signatures *(All Trustees must sign and date below.)*

Sign Here

Original signatures are required; electronic signatures and/or signature fonts are not authorized.

Trustee Signature:

X

Trustee Printed Name:

Date:

□□□ - □□□ - □□□□□□

Trustee Signature:

X

Trustee Printed Name:

Date:

□□□ - □□□ - □□□□□□

Trustee Signature:

X

Trustee Printed Name:

Date:

□□□ - □□□ - □□□□□□

Trustee Signature:

X

Trustee Printed Name:

Date:

□□□ - □□□ - □□□□□□

For additional trustee signatures, please complete and attach a separate photocopy of this signature section.

Investment Products: Not FDIC Insured * No Bank Guarantee * May Lose Value

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