

IRA Account Opening Checklist

All account owners/signers must provide the following:
 □ Legal Name □ Date of Birth □ Physical Address □ Social Security Number
 Current Government Issued Photo ID (driver's license, passport, military) Birth Certificate (Only minors with no current Government issued Photo ID)
IRA Beneficiaries
□ Legal Name
□ Date of Birth
□ Physical Address
□ Social Security Number