

# 4 Simple Steps to Get Started with Ally

Ally tops our list of recommended brokerage firms. Not only does Ally offer discounted commission rates to our clients, their trading platform allows you to use Lattco PRO and Lattco AutoPilot. They're also currently the only broker that allows us to place Snider Investment Method Vacation Trades.

## 1 Complete the Account Application

[USE THIS SPECIAL LINK](#) to start the account application process. This link is specific to Snider Advisors and is the first of a few steps to ensure that you will receive the discounted commission rates.

### QUICK TIPS:

- The account holder information and account type (IRA, Roth, Joint) should match your current brokerage account.
- Apply for appropriate Trade Level. Margin accounts require Trade Level 4 and non-margin accounts require Trade Level 3 (you may have to select "speculation" as your investment objective to receive the proper Trade Level).
- Simple IRA, SEP IRA, and trust account may require paper applications. Please write "Snider" on the top right-hand corner of the first page, above "Broker Rep Code."

## 2 Transfer Your Funds

Ally's Account Transfer Form (ACAT) is the best way to transfer your account from your current broker to Ally. Upon approval of your account application, you will receive an account number. Use this number to complete the ACAT form and then return it to Ally by fax (866-699-0563) or email ([select@invest.ally.com](mailto:select@invest.ally.com)).

### QUICK TIPS:

- The transfer process can take about two weeks to complete.
- Once you submit the ACAT form, move on to step 3. Do not wait until the transfer completes.
- Depending on the account type, you may be able to fund the account by check, ACH, or wire.

# 3

## Link Your Account to Lattco

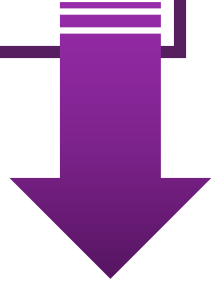
Now that you've opened and initiated funding for your Ally account, you can link it to Lattco. This is a two-part process:

**Limited Trading Authorization (LTA) Form** - The LTA authorizes Snider Advisors to place Vacation Trades in your account on your behalf if you have a situation where you are unable to place your own trades. The LTA also helps ensure that you receive discounted commissions. It also allows us to deduct your consulting and Lattco fees directly from your account rather than by credit card.

**Authenticate the Account** - Authenticating your account places it in our "branch." This enables us to view your account, which allows us to more effectively answer your trading questions, as well place Vacation Trades on your behalf. Return completed LTA to Snider Advisors by fax (888-647-6430) or email ([support@snideradvisors.com](mailto:support@snideradvisors.com).)

### QUICK TIPS

- Complete all the highlighted sections on the form.
- Include your account number on the upper right corner (leave the section for "RR#" blank).
- Initial boxes instead of using a check or X.
- Each of your accounts requires its own LTA.
- Log out of Ally before you authenticate your account.
- Enter only eight numerical characters; do not include any dashes.



# 4

## Trade Your Account

After you open, fund, and link your Ally account, you are ready to trade. Keep in mind that you do not have to wait until Trade Day to place your first trades. You may place your trades as soon as your account is funded and set up in Lattco.



Contact us:  
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888-676-4337

The intent of this handout is to help expand your financial education. All investors should consult a qualified professional before trading in any security. Snider Advisors has economic incentive for recommending that clients open an account with Ally. Specifically, Snider Advisors receives a flat referral payment for each new account it refers to Ally. More detailed information about the relationship and our fiduciary responsibility can be found in our ADV Part 2A. Clients may contact Snider Advisors with any questions about the terms of the agreement with Ally.