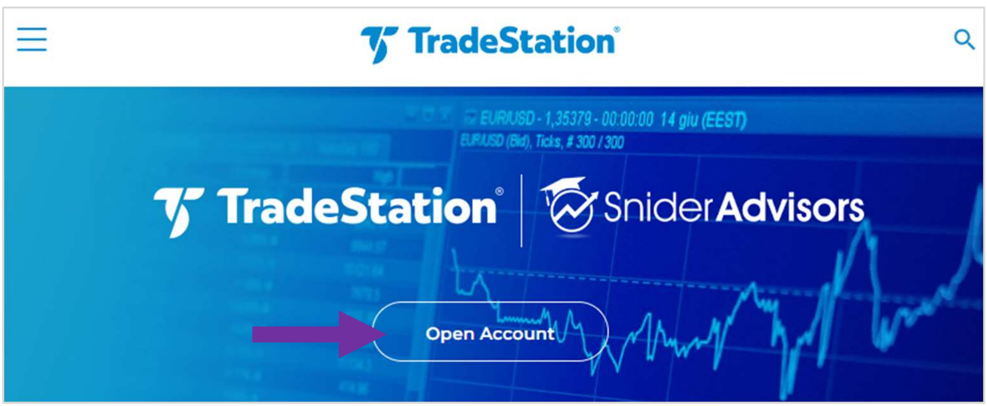
How to Open a TradeStation Account

Snider Advisors is happy to assist you in the process of opening your TradeStation account. This document walks you through the steps of completing the account application.

Open the Application

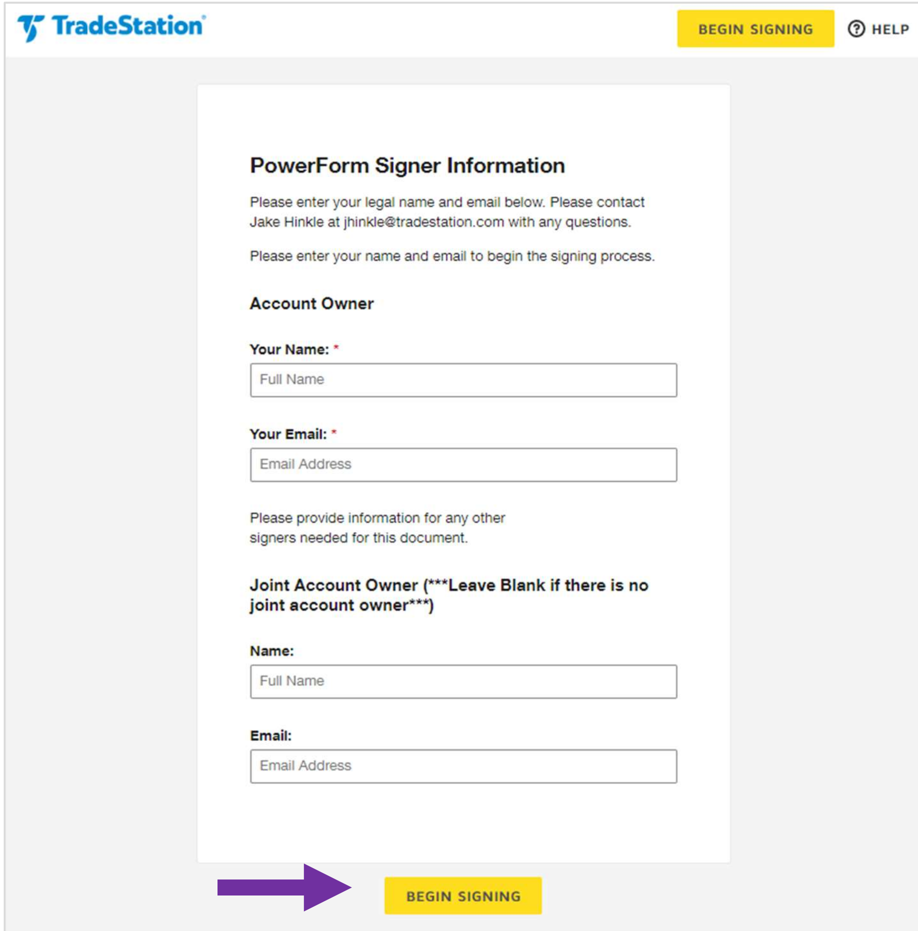
If you have multiple accounts, *start with your retirement account* (Traditional, ROTH, etc.).

1. It is important that you use https://www.tradestation.com/promo/snider-advisors/ to complete your application.
2. Click the **Open Account** link.



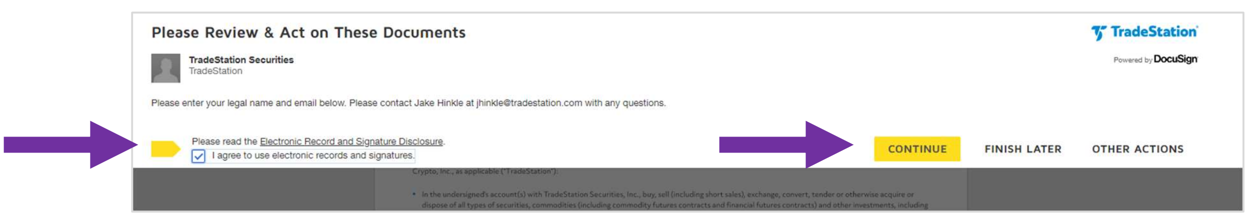
PowerForm Signer Information

1. The link will take you to **PowerForm Signer Information** page. You will enter the **Account Owner** and **Joint Owner** if applicable. *This information should match your Ally account*.
2. After you complete your information, click the yellow **Begin Signing** button.



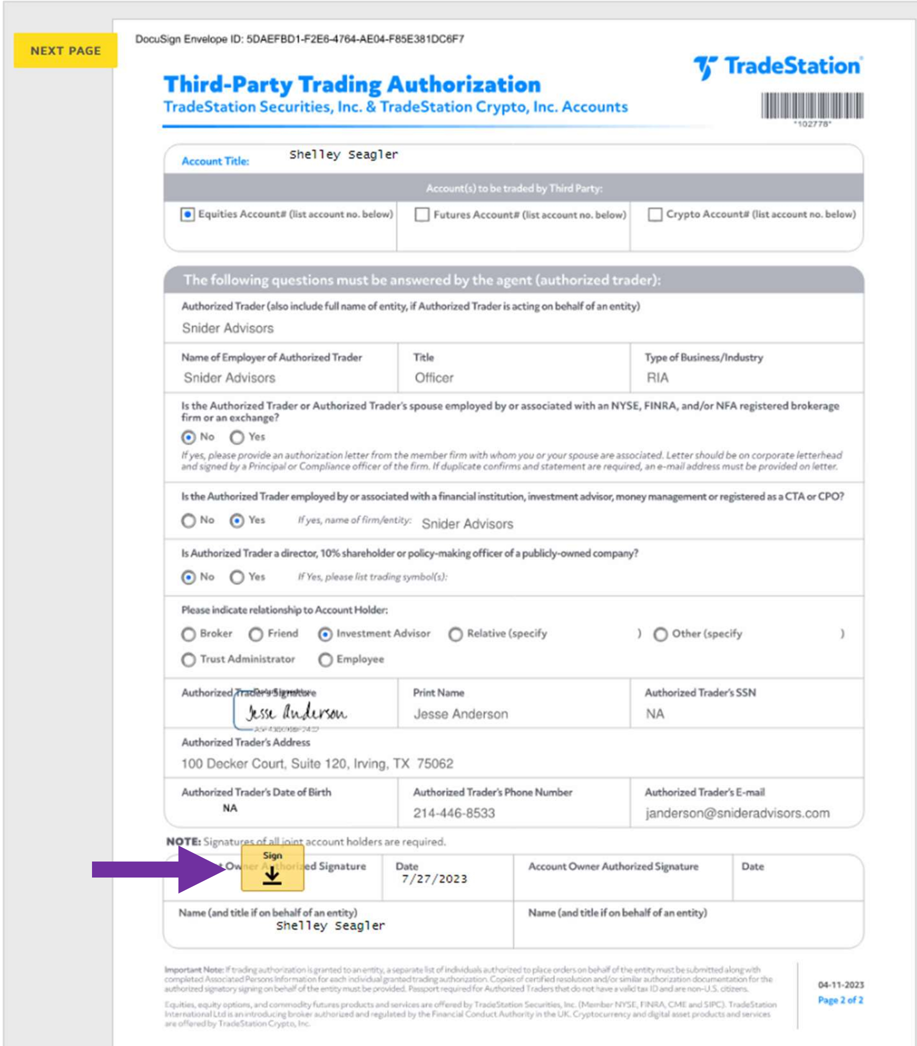
Electronic Signature

1. Your screen will reload, and you will be prompted to agree to use **electronic records and signatures**. Click the box next to the yellow arrow
2. Click **Continue**.



Third-Party Trading Authorization

1. You will now be prompted to complete the **Third-Party Trading Authorization**. On the second page of this document, you will be asked to review some information.
2. At the bottom of this form, you will enter your **electronic signature**.
3. Click the yellow **Sign** call out toward the bottom of the screen.



NEXT PAGE

DocuSign Envelope ID: 5DAEFBD1-F2E6-4764-AE04-F85E381DC6F7

TradeStation

Third-Party Trading Authorization

TradeStation Securities, Inc. & TradeStation Crypto, Inc. Accounts

Account Title: Shelley Seagler

Account(s) to be traded by Third Party:

- [x] Equities Account# (list account no. below)
- [ ] Futures Account# (list account no. below)
- [ ] Crypto Account# (list account no. below)

The following questions must be answered by the agent (authorized trader):

Authorized Trader (also include full name of entity, if Authorized Trader is acting on behalf of an entity): Snider Advisors

Name of Employer of Authorized Trader	Title	Type of Business/Industry
Snider Advisors	Officer	RIA

Is the Authorized Trader or Authorized Trader's spouse employed by or associated with an NYSE, FINRA, and/or NFA registered brokerage firm or an exchange? (•) No ( ) Yes

If yes, please provide an authorization letter from the member firm with whom you or your spouse are associated. Letter should be on corporate letterhead and signed by a Principal or Compliance officer of the firm. If duplicate confirms and statement are required, an e-mail address must be provided on letter.

Is the Authorized Trader employed by or associated with a financial institution, investment advisor, money management or registered as a CTA or CPO? ( ) No (•) Yes *If yes, name of firm/entity:* Snider Advisors

Is Authorized Trader a director, 10% shareholder or policy-making officer of a publicly-owned company? (•) No ( ) Yes *If Yes, please list trading symbol(s):*

Please indicate relationship to Account Holder: ( ) Broker ( ) Friend (•) Investment Advisor ( ) Relative (specify) ( ) Other (specify) ( ) Trust Administrator ( ) Employee

Authorized Trader's Signature	Print Name	Authorized Trader's SSN
Jesse Anderson	Jesse Anderson	NA

Authorized Trader's Address: 100 Decker Court, Suite 120, Irving, TX 75062

Authorized Trader's Date of Birth	Authorized Trader's Phone Number	Authorized Trader's E-mail
NA	214-446-8533	janderson@snideradvisors.com

NOTE: Signatures of all joint account holders are required.

Account Owner Authorized Signature	Date	Account Owner Authorized Signature	Date
Sign	7/27/2023		
Name (and title if on behalf of an entity) Shelley Seagler		Name (and title if on behalf of an entity)	

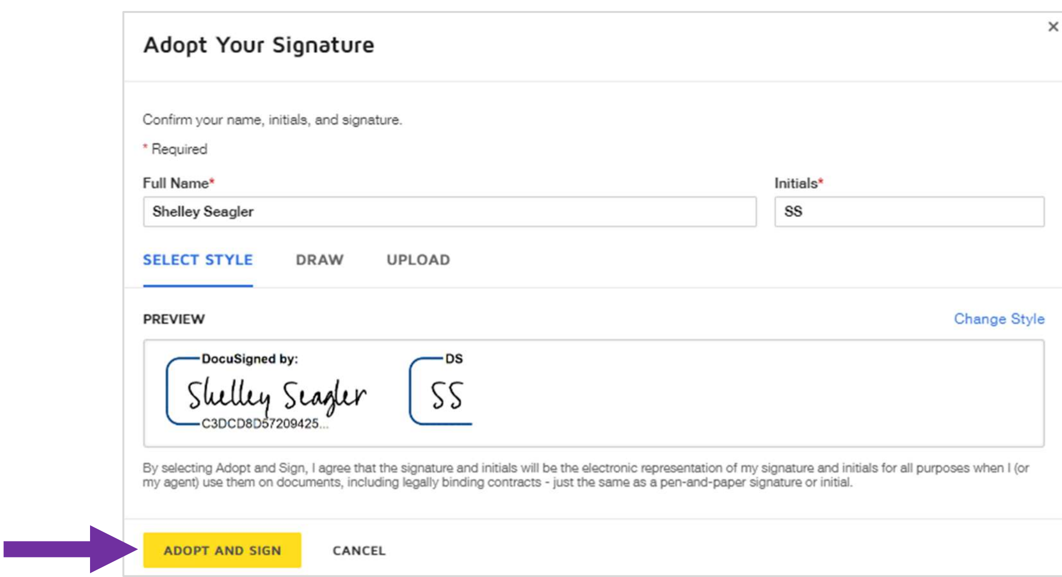
Important Note: If trading authorization is granted to an entity, a separate list of individuals authorized to place orders on behalf of the entity must be submitted along with completed Associated Persons Information for each individual granted trading authorization. Copies of certified resolution and/or similar authorization documentation for the authorized signatory signing on behalf of the entity must be provided. Passport required for Authorized Traders that do not have a valid tax ID and are non-U.S. citizens.

Equities, equity options, and commodity futures products and services are offered by TradeStation Securities, Inc. (Member NYSE, FINRA, CME and SIPC). TradeStation International Ltd is an introducing broker authorized and regulated by the Financial Conduct Authority in the UK. Cryptocurrency and digital asset products and services are offered by TradeStation Crypto, Inc.

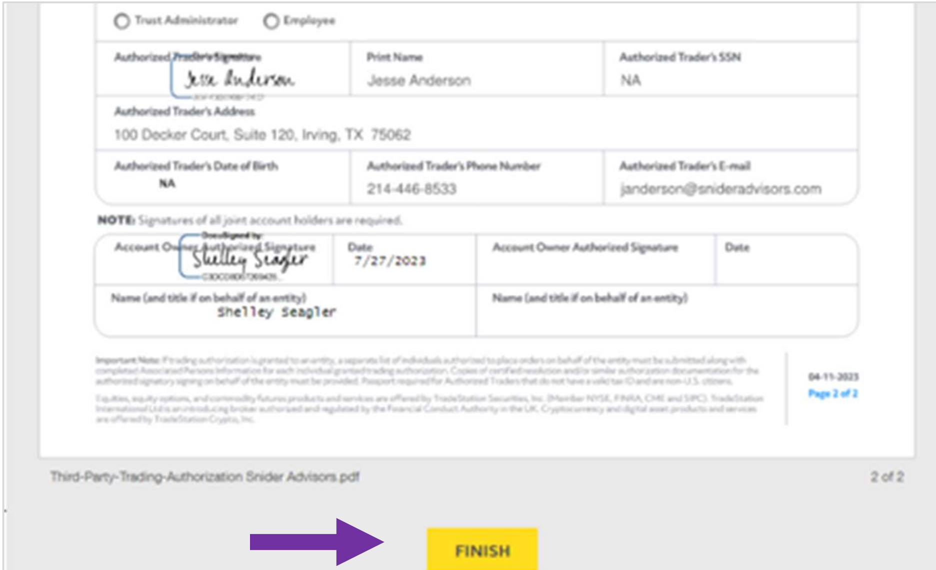
04-11-2023

Page 2 of 2

4. A window will pop up. Review your signature and click **Adopt and Sign**.

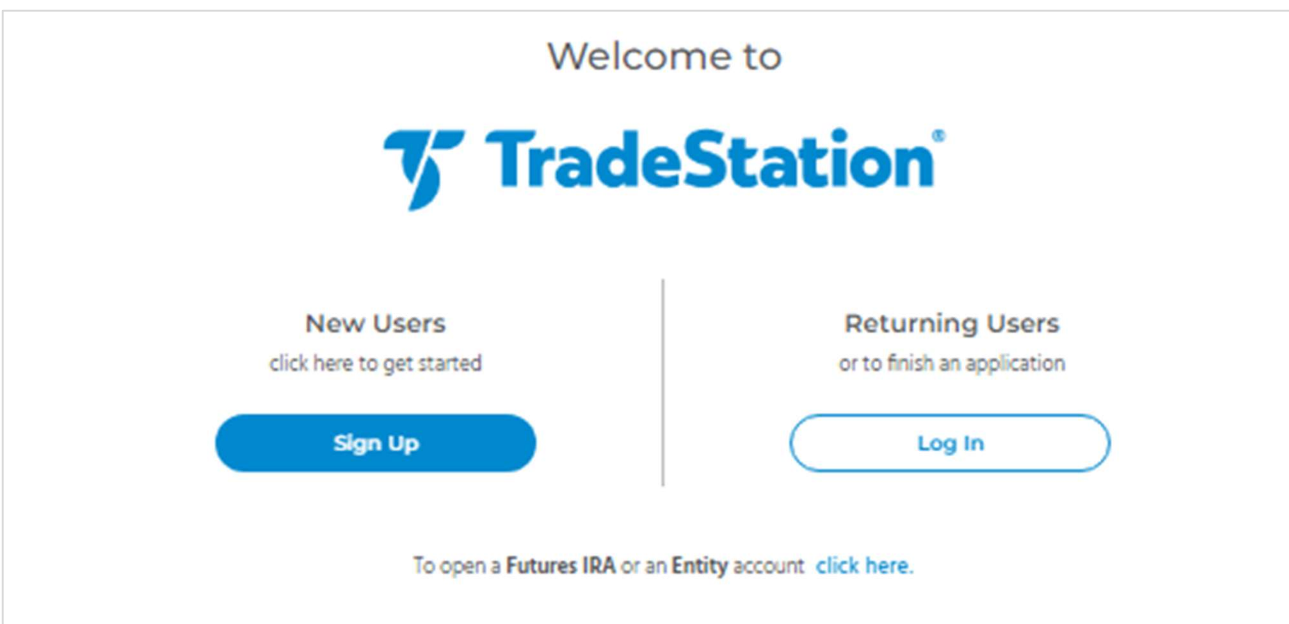


5. The pop-up window will close. Click **Finish**.



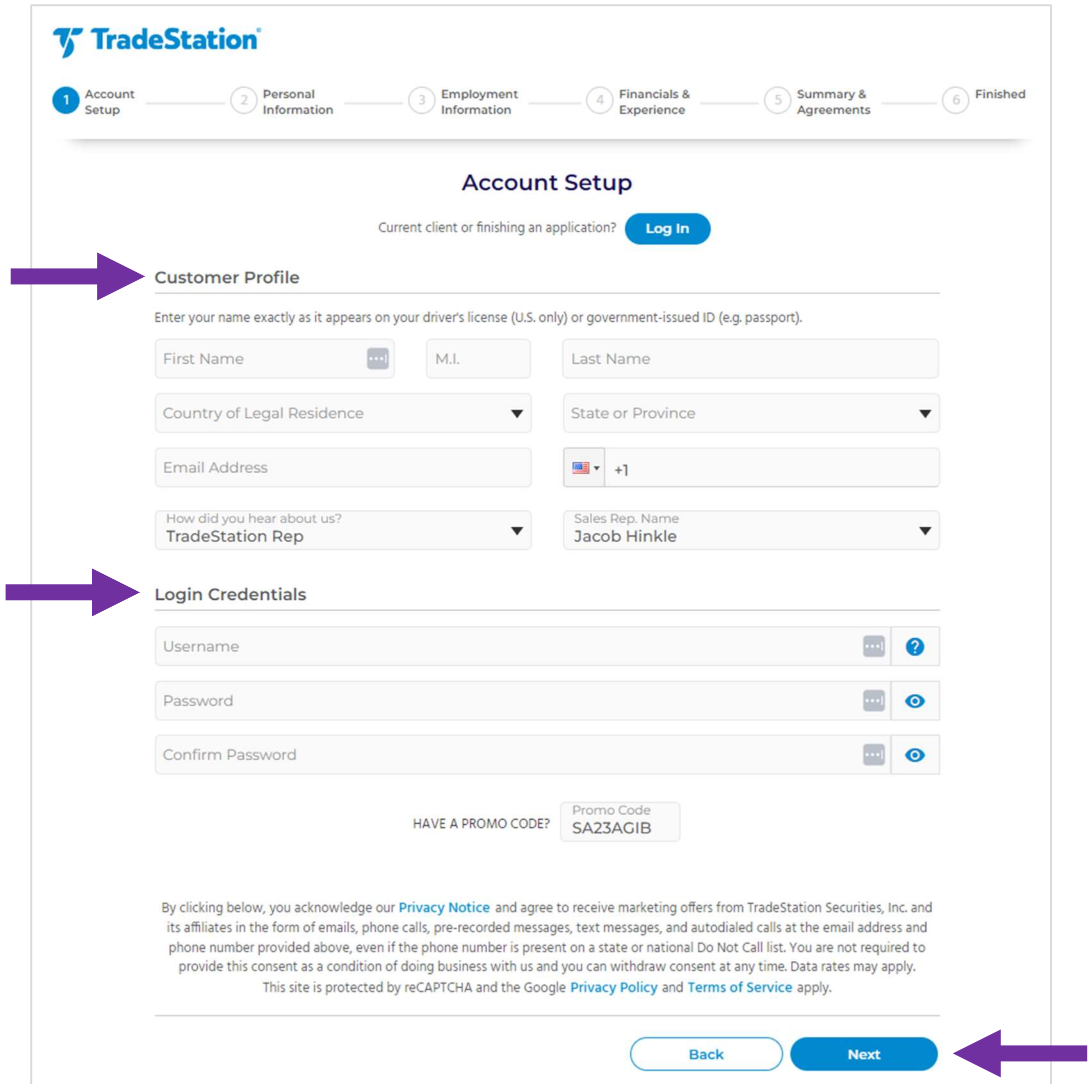
TradeStation Welcome

1. You will be prompted to either **Sign Up** if you are a New User or **Log In** if you are a Returning User.



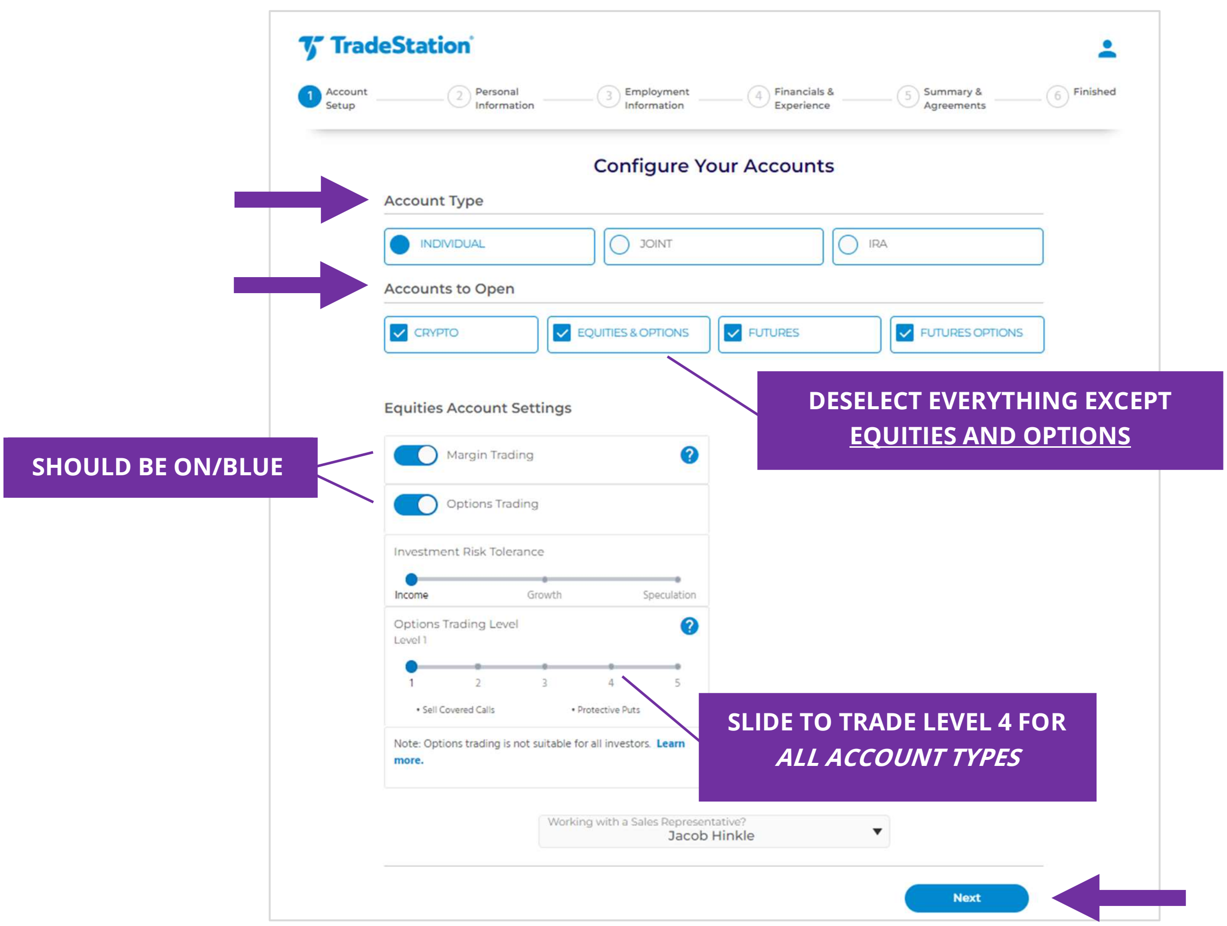
Account Setup

1. After completion of your Third-Party Trading Authorization, you will be prompted to complete your **Account Setup**.
2. Enter the information required in your **Customer Profile**.
3. You will then create your **Login Credentials**. This includes creating a Username and Password.
4. Click the blue **Next** button at the bottom of the screen.



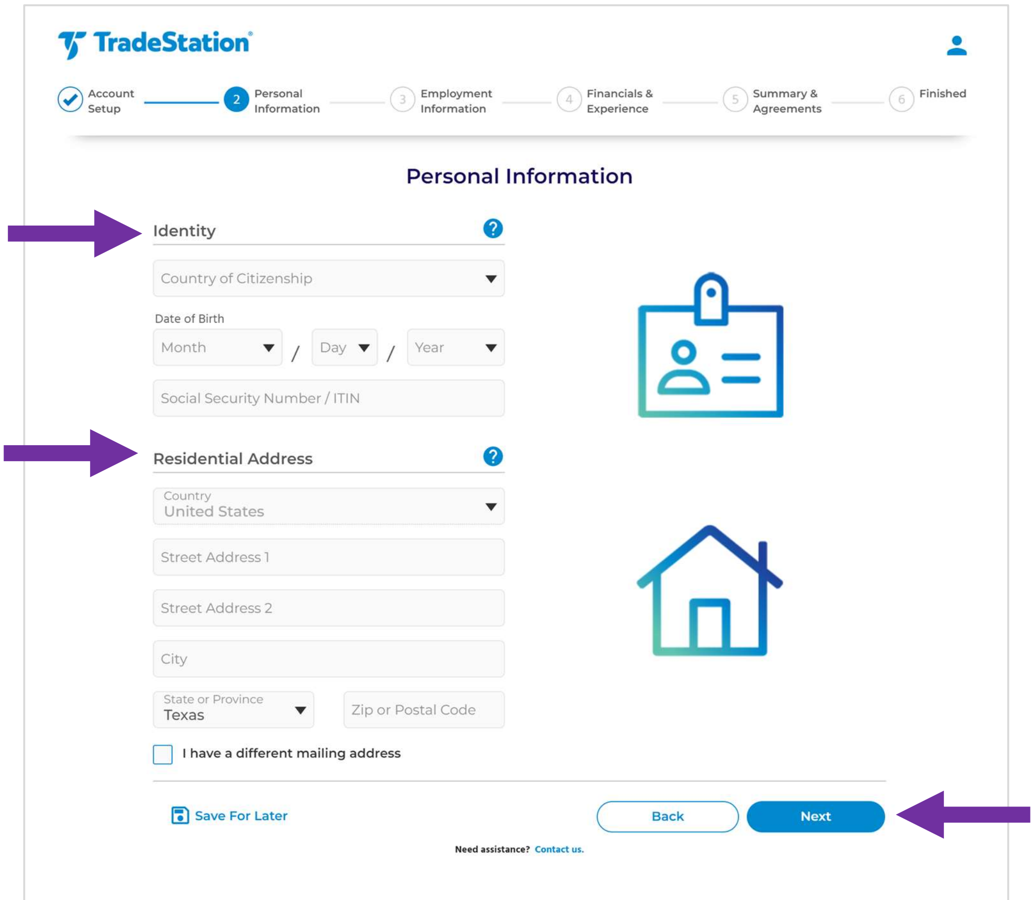
Configure Your Accounts

1. You will move forward to **Configure Your Accounts**.
2. Select the **Account Type**, either Individual, Joint, or IRA.
    - If you select **IRA**, you will then select they type of IRA you have.
    - If you select **Joint**, you must enter the Joint Owner's information. Each person on the Joint Account must have a *unique email address.*
3. Next you will select **Accounts to Open**. You should only have **Equities & Options** selected. You must *deselect* Crypto, Futures, and Futures Options.
6. Next, select **Equity Account Settings**.
    a. **Margin Trading** should be **on** (blue) *even if this is an IRA*. This does not mean you will be required to use margin, but turning on Margin Trading will help with some important trading efficiencies in your account.
    b. **Options Trading** should be on (blue).
    c. Next, slide your **Options Trading Level to Level 4**. This will automatically slide your Investment **Risk Tolerance** to Speculation.
7. Click blue **Next** at the bottom of the screen.



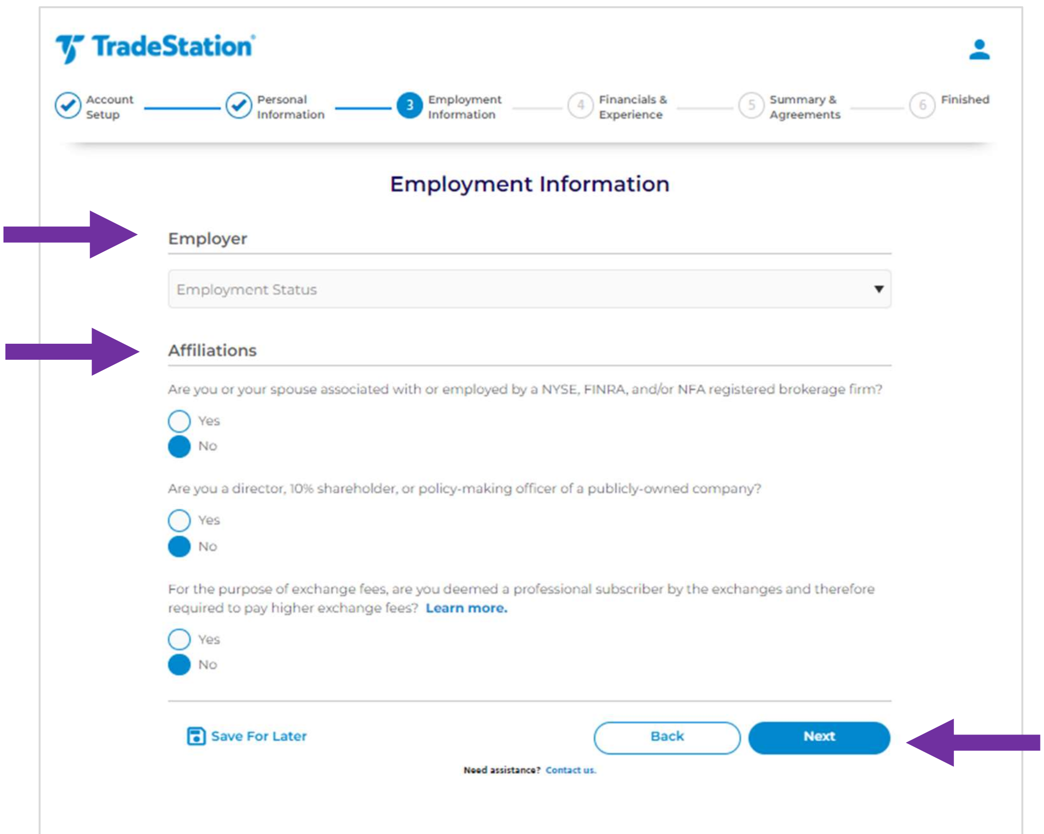
Personal Information

1. You will now enter your **Personal Information**.
2. Your **Identity** includes your Country of Citizenship, Date of Birth, and Social Security Number/ITIN.
3. Fill in your **Residential Address**. If you have a different mailing address, click in the box and enter that address.
4. Click the blue **Next** button at the bottom of the screen.



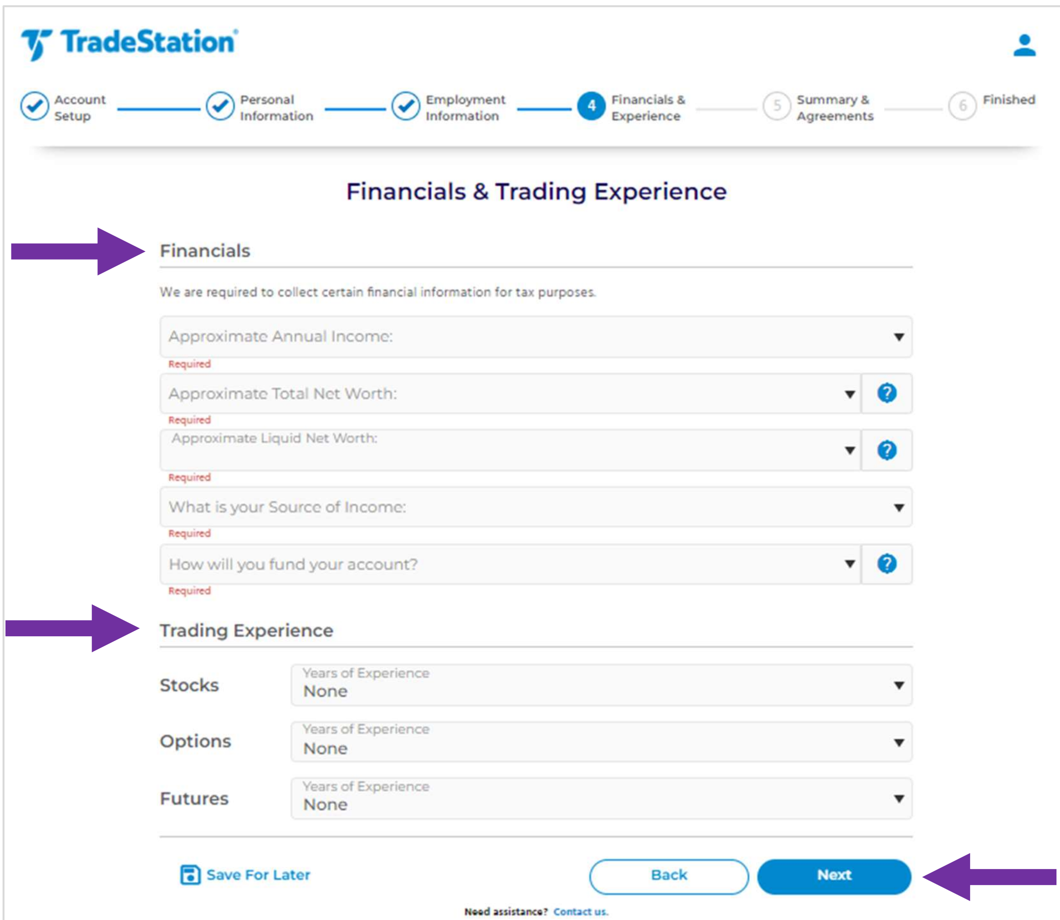
Employment Information

1. Next use the dropdown to select your **Employer**. If you select Employed or Self-Employed, you will be prompted to supply more information.
2. Next, select your **Affiliations**. If you answer yes to any of the questions, you will be prompted to supply additional details.
3. Click the blue **Next** at the bottom of the screen.



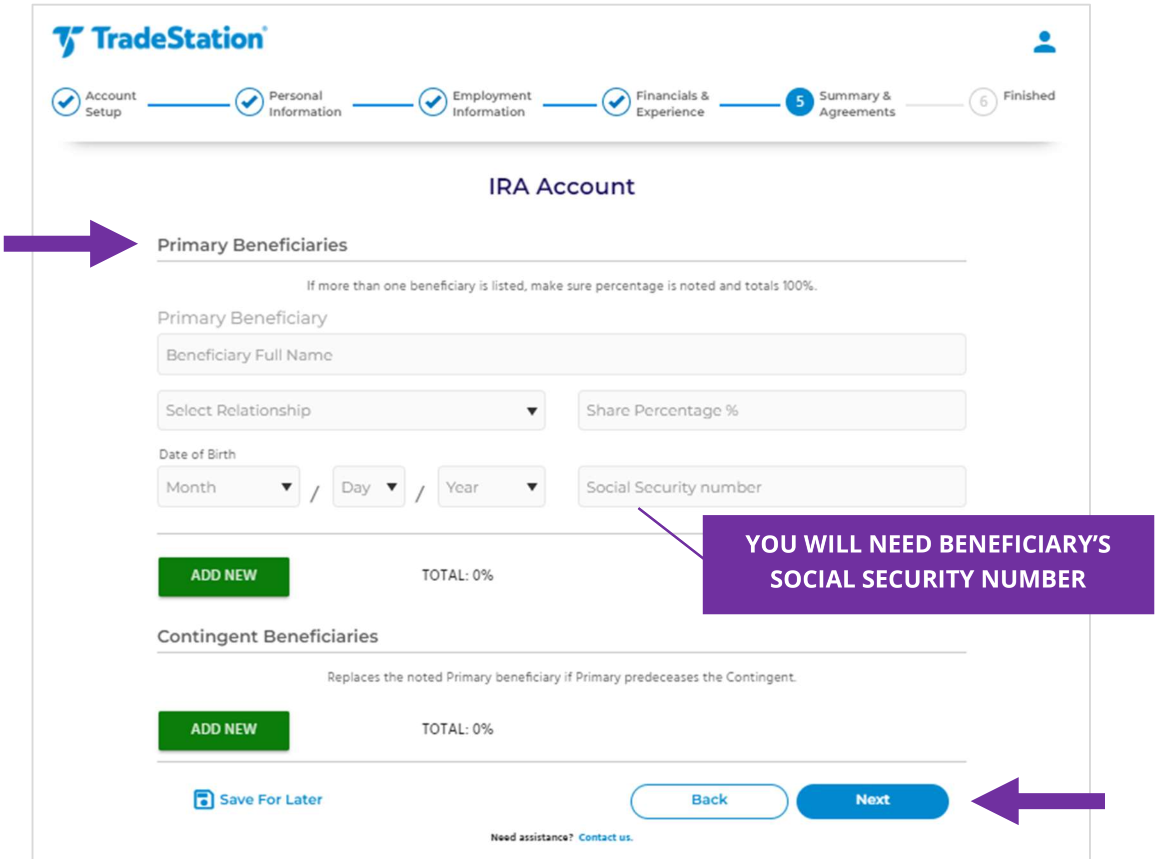
Financials & Trading Experience

1. You will now use the dropdown bars to enter your **Financials**. If you select an **Approximate Annual Income** under $50,000 or an **Approximate Net Worth** under $75,000, you will be asked to specify amount.
2. Use the dropdown bars to select your **Trading Experience**.
3. Click the blue **Next** at the bottom of the screen.



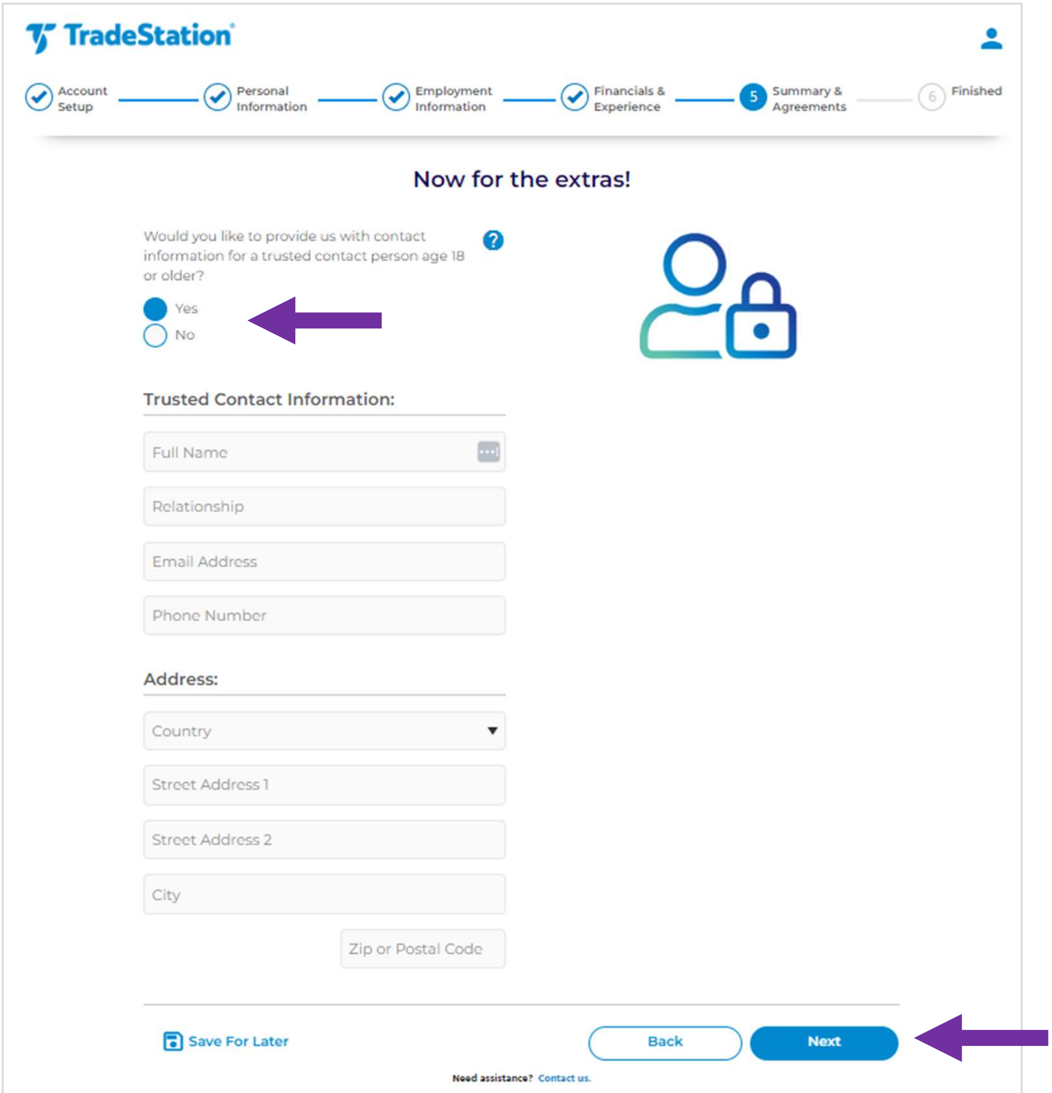
IRA Account

1. If you have an IRA Account, you must enter your **Primary Beneficiaries**. You will be required to enter the *Social Security number* for each beneficiary listed.
2. Click the blue **Next** at the bottom of the screen.



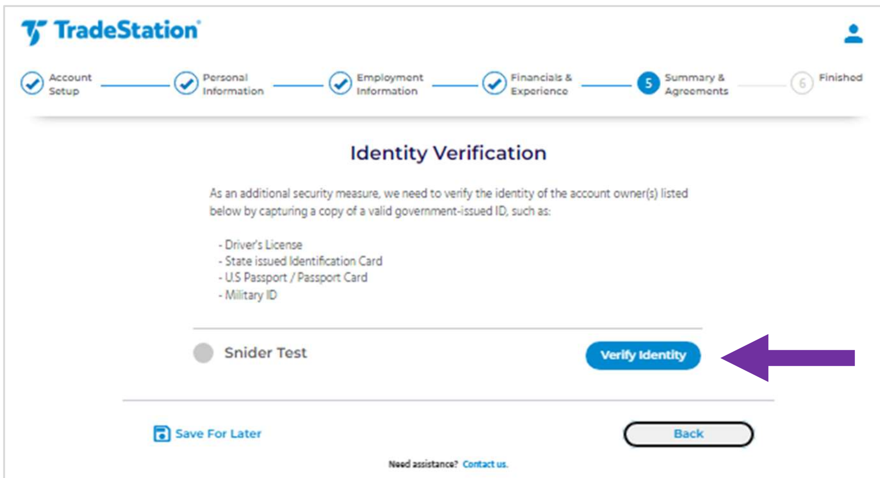
Now for the Extras!

1. In the **Now for the extras!** Section, you will be asked if you would like to provide contact information for a trusted contact person aged 18 or older.
2. If you select yes, you will fill in their name, relationship, and address.
3. Click the blue **Nex**t at the bottom of the screen.

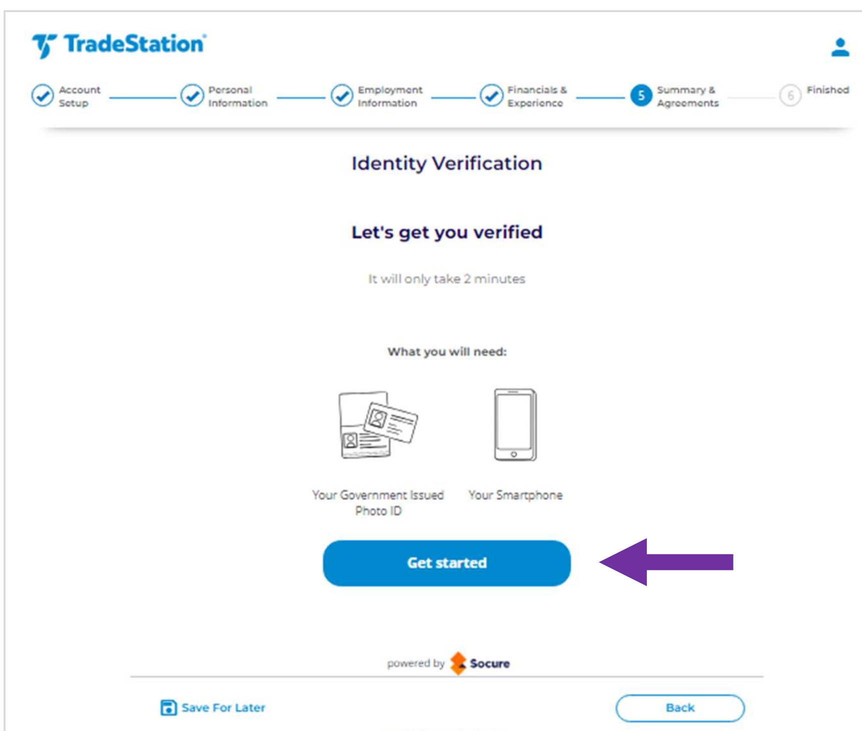


Identity Verification

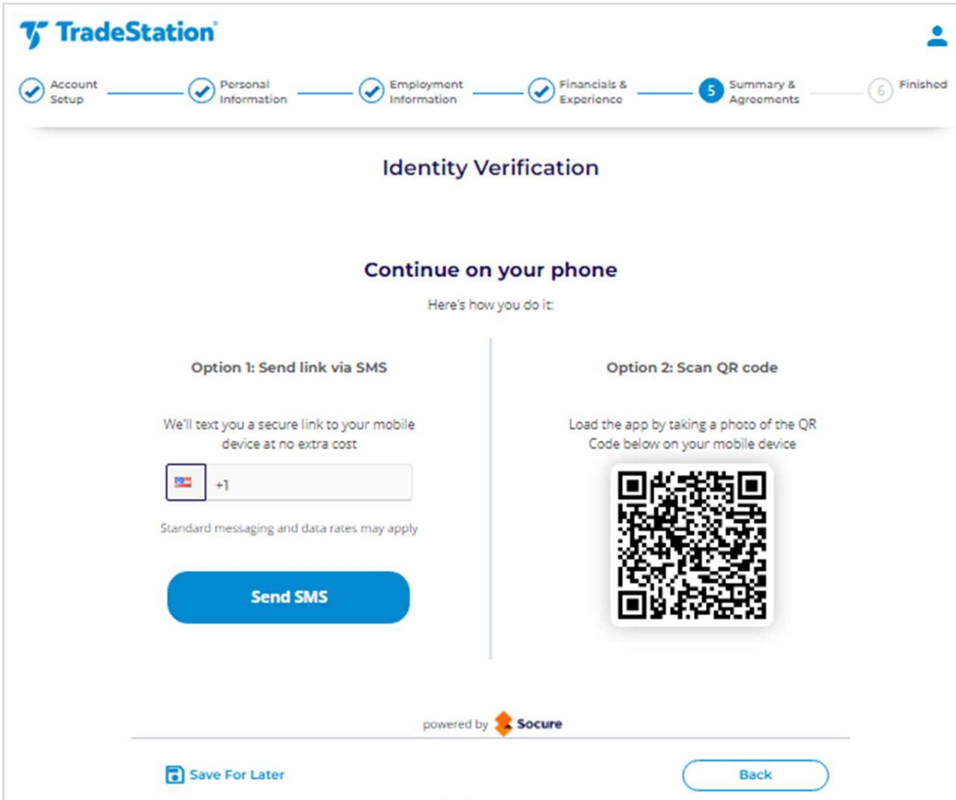
1. You *may be asked* to verify your identity. You can use one of the following valid government-issued ID:
   - Driver's License
   - State Issued ID Card
   - US Passport/Passport Card
   - Military ID
2. Click on the blue **Verify Identity** button.



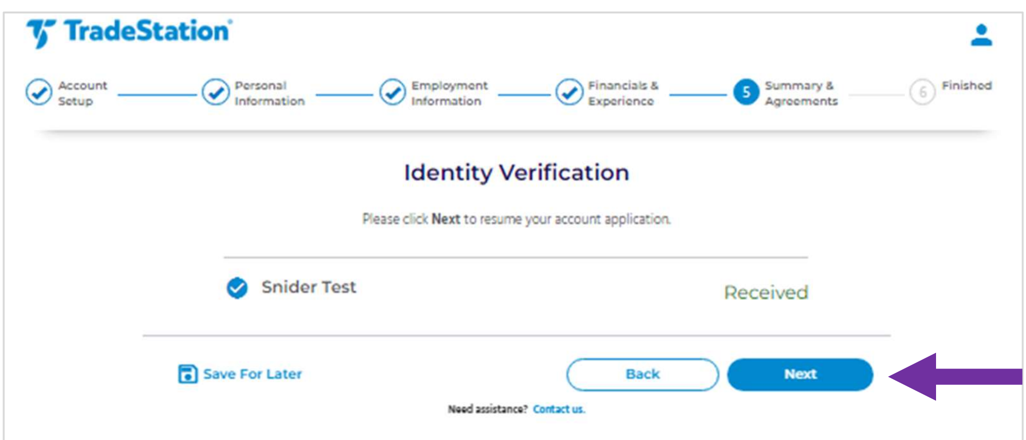
3. When your screen reloads click the blue Get Started button.



4. You *must have a smartphone* for this step. You can either use Option 1: Send a link via SMS or Option 2: Scan QR code.

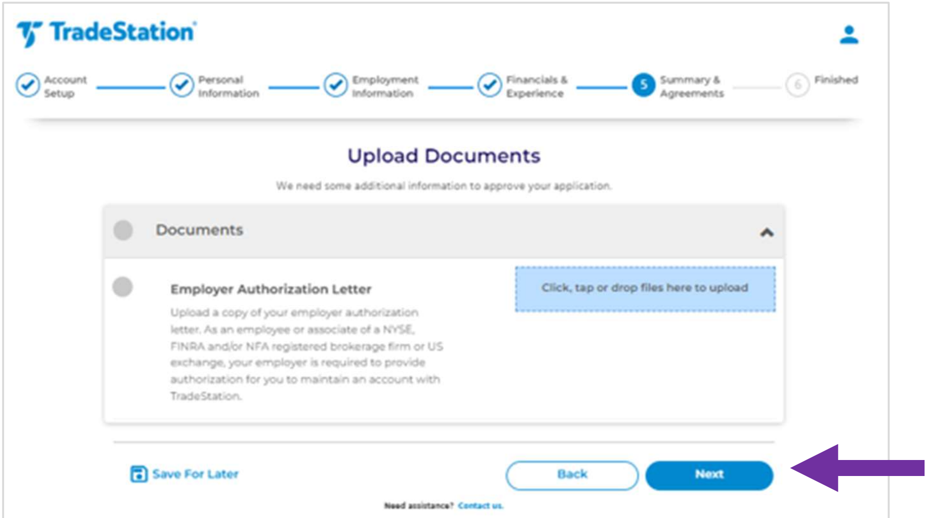


5. You will receive instructions on your smartphone for how to submit your ID.
6. After you submit your ID, your computer screen will reload. Click the blue **Next** button.



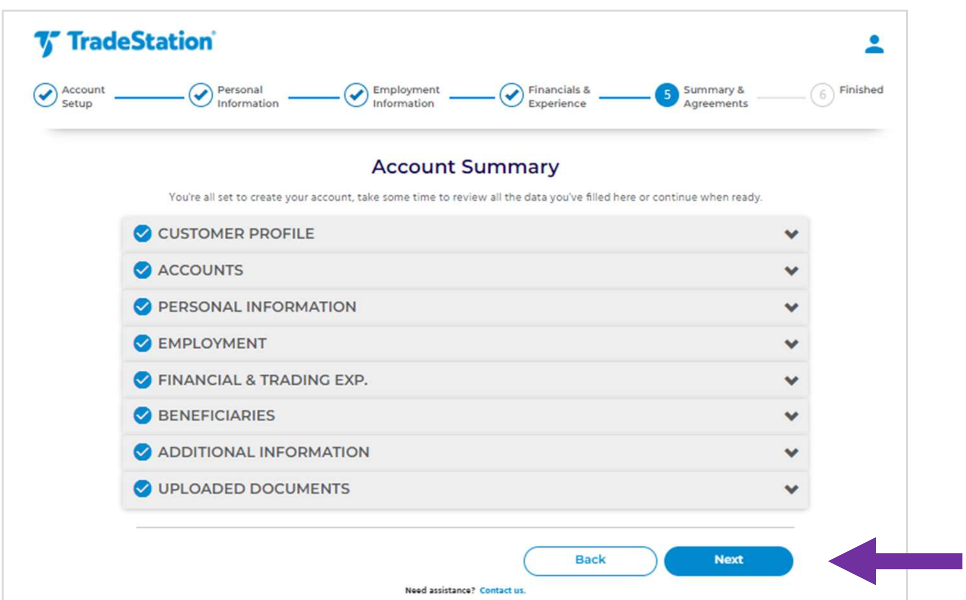
Upload Documents

1. Next, you *may be asked* to **Upload Documents**. If you selected any affiliations in the employment section, you will be required to submit additional documentation. Uploaded file names cannot include any spaces or additional characters.
2. Click the blue **Next** at the bottom of the screen.



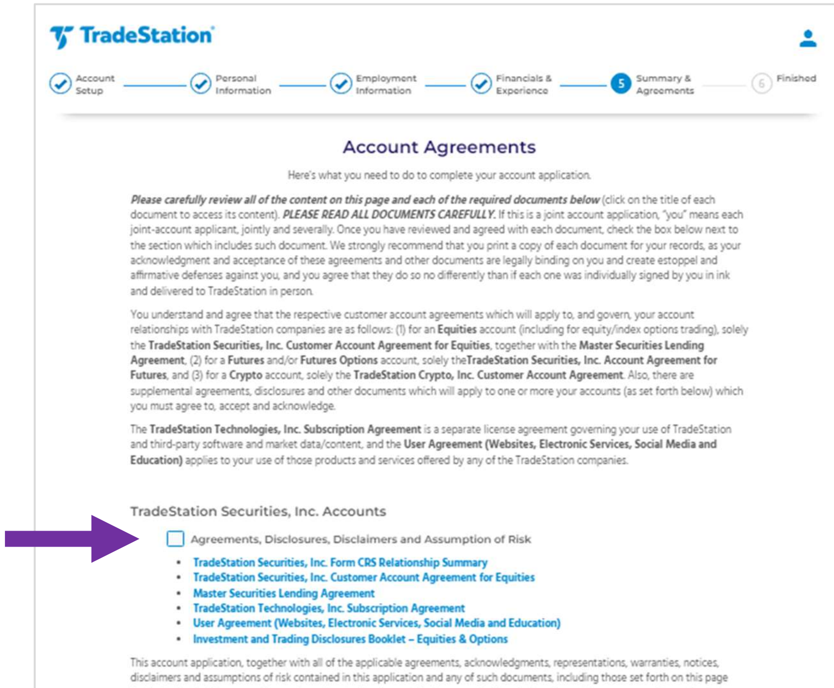
Account Summary

1. You should now see your **Account Summary**. You will be able to review your information on this page.
2. Click the blue **Next** at the bottom of the screen.

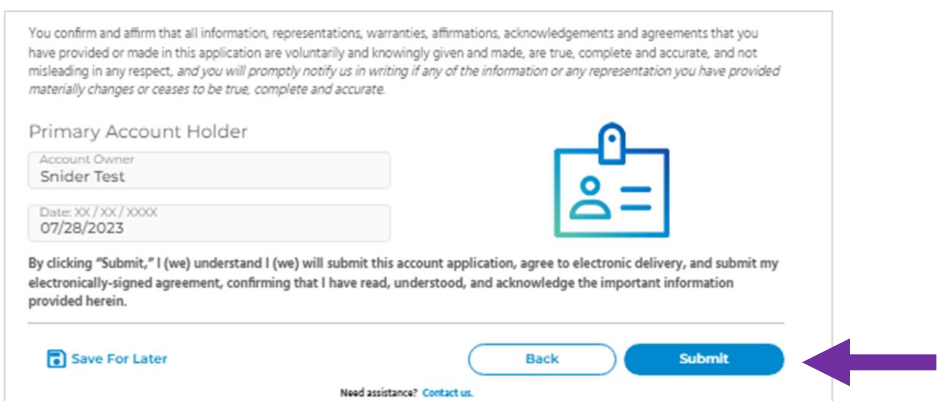


Account Agreements

1. The final step is **Account Agreements**. In the middle of this page, you will see links to all the documents required for your account. It is recommended that you read this page, as well as these documents, carefully.
2. Click the box in the **TradeStation Securities, Inc. Accounts** section.

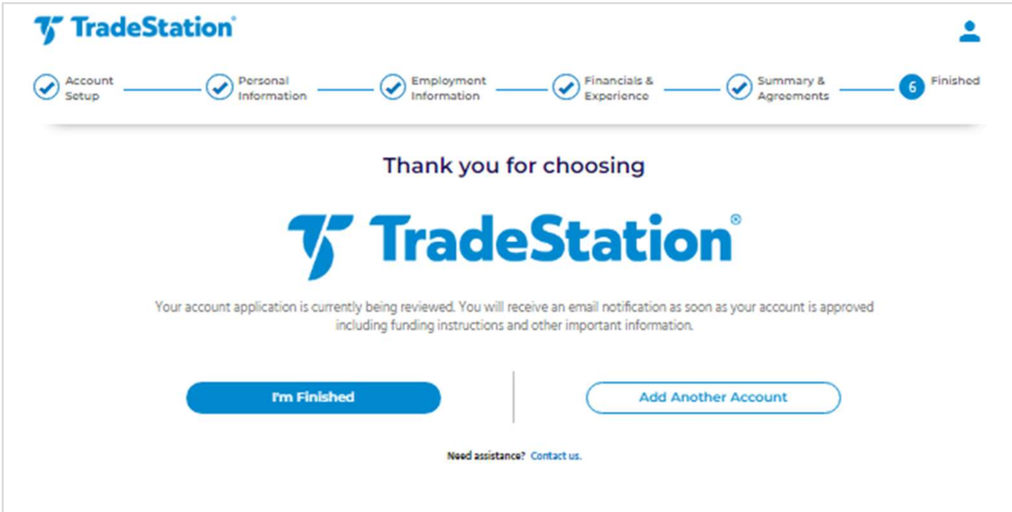


3. Scroll down and click **Submit**.



You’ve Completed Your Application

1. When your screen reloads, you can either select **I'm Finished** or **Add Another Account**.



You will receive an email from TradeStaion letting you know that they have received your application.

Please contact the Snider Advisors team at support@snideradvisors.com or 888-647-6430 with any questions.

Disclosure

Snider Advisors has an economic incentive for recommending that clients open an account with TradeStation. Specifically, Snider Advisors receives a flat referral payment for each new customer it refers to TradeStation. 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 TradeStation.