

# GETTING STARTED

- ✓ **Notice:** Regardless, of whether you're choosing to open an **Individual Account** or an **IRA Account**, please complete the Cooper Linse **"Advisory Agreement"** form located under the **Advisory Service** section.
  - Please complete **PAGES 1, 5, and 6** and then sign **PAGES 5 and 6**.

## Opening Individual Accounts

- ✓ For regular accounts (non-IRA), you will need to complete the four page **"Individual Account Application"** form.
  - Please complete all parts of **SECTIONS 1 and 2**.
  - **Section 3** may be left blank. Doing so will automatically have your funds credited to the "Rydex US Govt. Money Market Fund." All market timing will originate from this fund.
  - **Section 4** should be filled out only if you wish to have wire redemption privileges.
  - **Section 5** contains options for your account.
  - **Section 6** is for your signature(s).
- ✓ Also attached is the two-paged **"Appointment of Financial Professional"** form, which requires your signature.
  - This form allows our firm to initiate exchanges on your account as well as debit our quarterly management fee. Please read the form thoroughly and then **check the first box** which authorizes Rydex to deduct the Management Fee.
  - The bottom of page 2 is for your signature(s).

## Opening IRA Accounts

- ✓ You will not have to complete the "Individual Account Application." Instead, please fill out the **"IRA Account Application,"** located in the **Mutual Fund Applications** section under IRA Accounts.
  - You will need to print only **pages 3 through 8** of this document.
  - Transferring funds into your Rydex Retirement account will require you to print and complete the "Rydex Funds Retirement Account Transfer/Direct Rollover Request, which is **PAGE 9 and 10** of this document.
  - **NOTE:** If you're transferring from another IRA, please note that on the transfer form Rydex requests you provide a copy of a recent statement from your current custodian.
- ✓ Any checks for deposit into either an IRA or non-IRA account should be made payable directly to the mutual fund as follows: **"Rydex Investments"**.
  - **Note:** Even though Rydex requires a \$15,000 minimum for advisor-traded new accounts, exceptions may be made on a case-by-case basis. This means if you wish to make an investment for less than the \$15,000 minimum, we ask that you **contact our office prior** to sending the **Advisory Agreement, Account Application and Check**.
- ✓ For further assistance – or if you have questions regarding these instructions in any way – please feel free to call us at **708-645-8600**. We'll be more than happy to help you.