

Transitioning Your Taxable Account

OPTION 1: TRANSFER YOUR ACCOUNT VIA ACAT

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If you don't have one already, open
a new account of the same type
with a new custodian

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Inform your new custodian that you
will be transferring assets from an
existing account

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Provide the new custodian with your
OpenInvest 8CO- account number &
Apex's details

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Sign any documentation from your
new custodian, or finalize online

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Your new custodian sends the
document to Apex and Apex
transitions the assets

↓ 7-10 business days

Investments arrive in your
new account.

OPTION 2: CASH OUT YOUR ACCOUNT

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Please email Apex at
bdwacct@apexclearing.com.