



Account Forms and Disclosures

[ACH Authorization Form](#)

[Change of Address Form](#)

[Cost Basis Update Form](#)

[CSI Form CRS](#)

[CSI Privacy Policy](#)

[CSI Customer Information brochure](#)

[ETF Disclosure Form](#)

[Fed Wire Request](#)

[FINRA Breakpoint Disclosure Statement](#)

[Leverage ETF Disclosure](#)

[Momentum Client Access Request CLR](#)

[New Account Addendum Form](#)

[New Account Application](#)

[New Account Application With Margin And Options](#)

[Penny Stock Risk Disclosure Document](#)

[Request for Removal of Worthless Securities With irrevocable Stock Or Bond Power](#)

[Trading Authorization Agreement](#)

[Transfer on Death Application](#)

[Truth In Lending](#)

[Vision Checking Application and Agreement](#)