



10 S Riverside Plaza STE 1600 - Chicago, IL 60606  
Phone (888) 979-2257 - Fax (312) 265-9547  
[zackstrade.com](http://zackstrade.com) – [support@zackstrade.com](mailto:support@zackstrade.com)

## Account Transfer Fee Reimbursement Request

### Get Up to \$150 Cash Back\*

Name as it Appears on Account	
ZacksTrade Account Number	Phone Number
Amount of Transfer Fee	Name of Previous Firm

Account Holder Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please attach a statement providing proof of transfer fees.**  
**Please fax, email or mail both forms.**

\* ZacksTrade will reimburse account transfer fees up to \$150 charged by another broker when completing a full account transfer of \$5,000 or more to ZacksTrade. Credit will be deposited to your account within 30 days of receipt of the Account Transfer Fee Reimbursement Request form and proof of transfer fees. Offer is valid for new and existing ZacksTrade clients. This offer does not apply to Termination, Maintenance, or IRA fees. Offer not valid for employees of ZacksTrade or employees of other affiliated companies. Making the switch to ZacksTrade is easy. For new accounts, [Open an Account](#) and submit transfer instructions during the application process. For existing clients, transfer instructions can be submitted by logging into [Account Management](#) and clicking on Funding > Position Transfers. ZacksTrade reserves the right to restrict or revoke this offer at any time.

Office Use Only:

Principal Review:	Date Received:	Amount Reimbursed:
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