

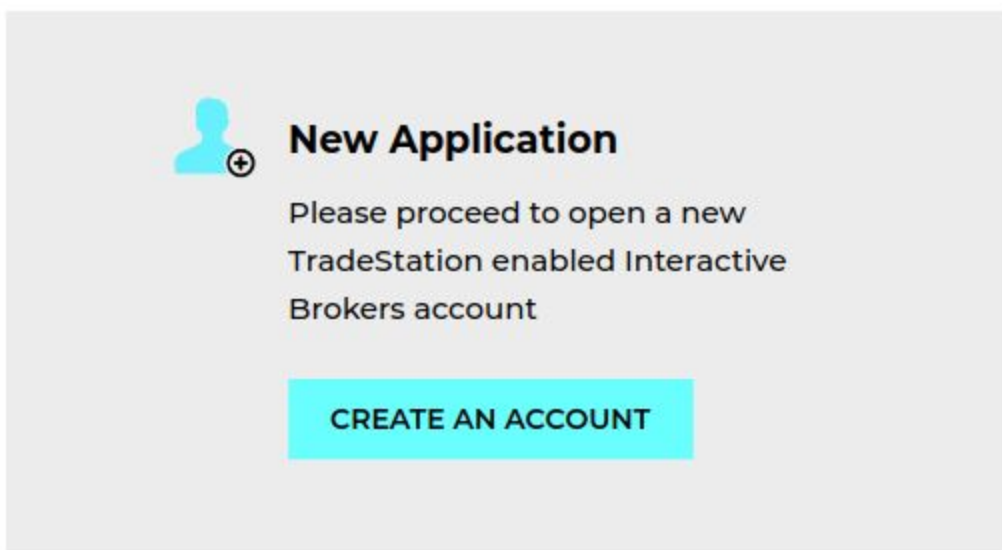
Ghid Deschidere Cont Broker Tradestation

Acest ghid e creat în decembrie 2020. Sunt 7 ani de când investesc la bursă și în acest timp am avut conturi la mulți brokeri. Am observat că ei modifică des procesul de deschidere a conturilor, așa că la data la care începi să urmezi ghidul e posibil să fie pași care nu coincid.

Dar nu te îngrijora. De obicei sunt chestii clare și ușor de înțeles. Unde nu ești sigur, poți căuta răspunsul pe Google sau să-mi scrii un email.

Procesul de astăzi pentru deschiderea contului e descris mai jos:

1. Accesează <https://www.tradestation-international.com/global/>
2. Click pe butonul **OPEN AN ACCOUNT**
3. Alege **New Application / CREATE AN ACCOUNT**



4. Completeaza datele personale (Nume, Prenume, Email, Telefon și țara), în rest nu conteaza ce completezi. Dacă vrei să faci cont pe firmă, scrie și numele firmei.
5. Bifează că ai citit Termenele și lasă nebifată ultima linie. Apoi click pe **CONTINUE TO APPLICATION**

Please read the agreements available below:

AGREEMENTS >

Please tick this box to confirm you have read and agreed to the terms of the agreements above



If you wish to review the agreements in PDF format, please download them: [HERE](#)

Please tick this box if you wish to be contacted with product updates and special offers

CONTINUE TO APPLICATION

* These fields are required.

6. Broker Client Application/Choose Account Type - Broker Client - **ALEGE Individual**

7. Completează din nou adresa de email, alege-ți un nume de utilizator și o parolă. Apoi click să mergi mai departe





Create a Username and Password

Email Address

Username

Password

 Show

-  Cannot match username
-  Length of 8 to 40 characters
-  Contain at least 1 letter
-  Contain at least 1 number

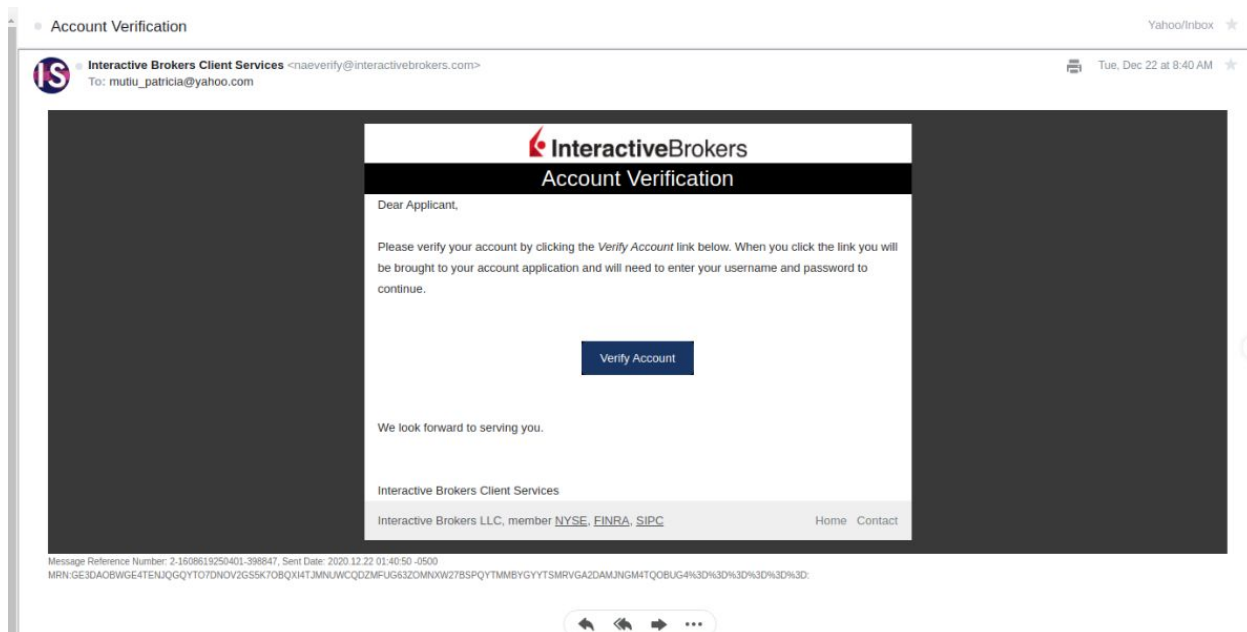
Confirm Password

Country/Region

Residential Country

8. Accesează-ți căsuța de email și deschide email-ul primit de la Interactive Brokers, compania de brokeraj prin care Tradestation execută tranzacțiile. Poate e puțin confuz că ai de-a face cu ambele companii. În final, ignoră toate acestea. Tu vei avea un singur cont și o aplicație pentru a face tranzacții.

9. În email, click pe butonul **Verify Account**





10. După click-ul din email vei fi direcționat la următoarea pagină: **Complete a Started Application**

11. Introdu numele de utilizator si parola pe care le-ai ales la pasul 7

12. Customer Type - Alege Individual

You will not be able to return to this page after you continue to the application.

Customer Type 

Individual 

Will the account holder(s) be the beneficial owner(s) of all of the funds and investments that will be in this account?

Yes No

[Continue →](#)

13. Completeaza toate informatiile de contact

- La Tax Identification Number se completeaza CNP-ul
- La Employment (angajator) se lasa bifat pe Nu raspunsul la intrebarea de mai jos:

Are you or anyone in your immediate family employed by or registered with a broker-dealer, investment advisor, futures commission merchant, hedge fund, exchange or other financial services firm?

Yes No

14. Source of Wealth - Orice doresti - Un exemplu mai jos:

Source of Wealth

Please select all sources of wealth and declare the percentages of each. Regulations require that we collect this information.

<input checked="" type="checkbox"/>	 Income from Employment	-	50 %	+
<input checked="" type="checkbox"/>	 Inheritance/Gift	-	50 %	+



SELECT ALL THAT APPLY

<input checked="" type="checkbox"/>	Disability / Severance / Unemployment
<input checked="" type="checkbox"/>	Interest / Dividend Income
<input checked="" type="checkbox"/>	Market Trading Profits
<input checked="" type="checkbox"/>	Pension / Government Retirement benefit
<input checked="" type="checkbox"/>	Property
<input checked="" type="checkbox"/>	Other
<input checked="" type="checkbox"/>	Allowance / Spousal Income

15. Base Currency - USD

16. Seteaza si tine minte raspunsurile pentru 3 perechi intrebare - raspuns. Vor fi folosite ca Intrebari de Siguranta pentru contul tau de la Interactive Brokers. Aplicatia iti va oferi cateva variante din care sa alegi. Recomand sa le notezi undeva.

Account Information ?

Base Currency

United States Dollar USD



Security Questions

Security Question One

Choose One



Answer One

Required

Security Question Two

Choose One



Answer Two

Required

Security Question Three

Choose One



Answer Three

Required

17. MiFIR National Client Identifiers - Completeaza CNP-ul si numarul pasaportului (daca ai).
Daca nu ai pasaport bifeaza NO

National Passport Number

N.A.

Do you have the requested national identification?

Yes

No

Configure Your Trading Account

1. Account Type - Cash
2. Income and Net Worth - Pune cat mai mari, nu se verifica.
3. Investment Objectives and Intended Purpose of Trading - Growth si Preservation of Capital and Income Generation

Account Type

Cash ▼

Income and Worth

Provide the financial information below, which will be used by our Compliance Department to determine whether you are eligible to trade the investment products you select now or in the future.

Annual Net Income in USD

50,000 - 99,999 ▼

Net Worth in USD

75,000 - 99,999 ▼

Liquid Net Worth in USD

20,000 - 49,999 ▼

Investment Objectives and Intended Purpose of Trading

Your choices below determine the investment products that you can be approved to trade.
Check all that apply.

- Growth
- Hedging
- Preservation of Capital and Income Generation
- Profits from Active Trading and Speculation

4. Trading Experience and Permissions - 3 ani experienta, 26-50 tranzactii pe an si Good Knowledge la Stocks si Optiuni


Trading Experience and Permissions

Your choices below determine the investment products that you can be approved to trade. Add all that apply.

Stocks ✕

Experience and Trading Knowledge

3 Years of Experience ▼ 26 - 50 Trades per Year ▼ Good Knowledge ▼

 Markets ✕ Central Europe ✕ United States + Add


Options ✕

Experience and Trading Knowledge ?

3 Years of Experience ▼ 26 - 50 Trades per Year ▼ Good Knowledge ▼

 Markets + Add

5. La Additional Products si Employer Information lasa cum apare implicit.

Additional Products 

You can always configure additional trading permissions after your account is approved.

Employer Information

Is the account holder a director, a 10% shareholder or a policy-making officer of any publicly traded company?


Yes No

6. Confirm Your Tax Residence - Treaty Benefits Qualifications

- Bifeaza - I certify that I am a resident of the country below within the meaning of the income tax treaty between the United States and that country.
- Selecteaza Romania

Treaty Benefits Qualifications

I certify that I am a resident of the country below within the meaning of the income tax treaty between the United States and that country.

Romania 

I do not qualify for US tax treaty benefits.

7. Certification - Yes la ambele intrebari

Certification

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income to which this form relates or am using this form to document myself as an individual that is an owner or account holder of a foreign financial institution,
- The person named on line 1 of this form is not a U.S. person,
- The income to which this form relates is:
 - not effectively connected with the conduct of a trade or business in the United States,
 - effectively connected but is not subject to tax under an income tax treaty, or
 - the partner's share of a partnership's effectively connected income,
- The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country, and
- For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions to IRS Form W-8BEN.
- **I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.**

I agree under penalty of perjury that each certification above is true and correct and confirm I have reviewed the information on this form W-8BEN (including any prepopulation) and it is true and correct.

Yes No

I consent to the collection and distribution of tax forms in an electronic format in lieu of paper, including through the account management portal.

Yes No

Contact customer service if you cannot make either representation.

8. Signature - Tasteaza numele tau asa cum apare putin mai sus la Signature

Account Title

Patricia Ana-Maria Popescu

Dated

2020 December 23 1:32AM EST

Signature - Patricia A Popescu

Patricia A Popescu



Review & Sign Agreements - Revizuieste Toate informatiile si semneaza acordul

1. Semneaza exact ca la pasul precedent prin tastarea numelui.
2. Va aparea un mesaj ca e nevoie de mai multe informatii - Click pe Continue Application



Sorry, we need more information to set up your account.

[Continue application](#)

3. Incarca o copie electronica a buletinului si o dovada a adresei. Dovada adresei poate fi un extras de cont pe care sa apara adresa din buletinul tau sau o factura de utilitati pe numele tau si cu adresa din buletin.
4. Confirma numarul de telefon
5. La Funding (Depozit de Bani) nu face nimic pentru ca nu e obligatoriu. E mai sigur sa faci dupa aprobarea si activarea contului.
6. Felicitari! Ai terminat procesul de deschidere a contului cand vezi mesajul: **We've submitted your application for approval.**



We've submitted your application for approval.
Your account application is pending approval.

Final Steps to a Completed Application

Review and complete the following items where applicable.



Fund Your Account

We review funded account applications first.
If for any reason your application does not get approved, we will send your money back.

[Transaction History](#)

[Fund Your Account](#)

Urmează ca cei de la Interactive Brokers să verifice documentele pe care le-ai adaugat si sa aprobe și activeze contul.

Vei fi înștiințat pe email când contul tău e aprobat.