



Ally Invest Securities
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 Member FINRA and SIPC - Ally.com/invest

Account Transfer Fee Reimbursement Request

Fax or mail your request back to us when you're ready.

Name as it appears on Account	
Email Address	Ally Invest Securities Account Number
Name of Previous Firm	

Signature: _____

Date: _____

Signature: _____

Date: _____

Office Use Only :

Ally Invest Securities Approval:

Principal Signature	Date

You're eligible to receive the transfer fee credit of \$75 if you complete an account transfer of \$2,500 or more. We'll deposit this credit into your new Invest account within 30 days of receiving your reimbursement request form. Ally Invest reserves the right at our sole discretion to modify or terminate this offer without prior notice. Pulling off the switch is easy. Here's how: Open a New Account or if you already have an account, log in. Complete and print an Account Transfer Form. Then, fax or mail the signed Account Transfer Form to Ally Invest Securities. To request your account transfer reimbursement, fax or mail your Account Transfer Reimbursement Form back to us. This offer cannot be combined with any other reimbursement offers including our offer to credit fees for initial funding by wire or overnight mail. Customers should consider the differences in services and transfer fees before switching their brokerage accounts.