



Please refer to the table of contents on page two of the account application, Instructions for Account Forms, on your R.J.O'Brien Account Application for directions on how to open a **Trust Account or Trust Account with Power of Attorney**. We have highlighted the signature pages that are required below:

1. **Sign and date:**
 - Page 2 Risk Disclosure
 - Page 3 Privacy Policy – please review
 - Page 4 Account Application – complete all information (*leave NOTHING blank*)
Use the trustee's information for Date of Birth, number of dependents, Marital status, etc
 - Page 5-14 Account Agreement – review, sign & date page 14
 - Page 15 Voluntary Arbitration Agreement
 - Page 16 Electronic Transmission of Statements – (if applicable)
 - Page 17 Hedge Agreement – *to be signed by hedge customers only*
Liquidation: **initial** choice where indicated
Commodities: **list and justify** the commodities you will be hedging
 - Page 18 Introducing Broker Authorization – enter DEVO Capital
 - Page 19-20 Managed Account Agreement – POA – (if applicable)
 - Page 21 Exempt Commodity Trading Advisory Letter – (if applicable)
 - Page 22 Trustee Certification of Investment Powers
 - Page 23 Personal Guarantee
 - Page 24 Additional Risk Disclosure – (if applicable)
 - Page 25 Internal Revenue Code Substitute W-9
 - Page 26 Account Transfer – only if you wish to transfer current open positions, cash, margins, etc from previous firm to R.J.O'Brien (if applicable)

2. Please fax or email the above documents to the number or email provided below and keep the original documents with you. After the account has been opened, please mail the original documents to DEVO Capital Management when we request them (please **DO NOT** mail them directly to R.J.O'Brien). We recommend that you make copies for your reference.

3. Please note that when remitting checks they must come from a same name account, made payable to R.J. O'Brien & Associates and mailed to DEVO Capital Management. To wire transfer funds directly to R.J. O'Brien, you will need the following information:
 - Bank Name: Harris Trust & Savings, Chicago, IL
 - Routing/ABA #: 071-000-288
 - Further credit to (FCT): R.J. O'Brien & Associates, Inc.
Customer Segregated Funds, #367-171-6
 - For Further Credit (FFC): Account name* and account number with R.J. O'Brien
(*please note that a wire must come from a same name account)

If you should have any questions feel free to call 800-722-0915 or 970-264-4399. We are looking forward to working with you.

Best Regards,

Mike DeVooght, Bryan Looper, Matt DeVooght & Nancee Gregory