SynthEquity™ Onboarding Guide

1. Review and Sign the Measured Risk Portfolios Sub-Advisory Agreement

- Non-Obligatory Agreement available upon request. To be signed by a principal of the firm.

2. Obtain a Charles Schwab Marketplace Master Account Number

- Ensure the FA Master is a *Marketplace Master* and is approved for Level 2 options trading (Spreads and Margin).

3. Complete the Measured Risk Portfolios Suitability & Portfolio Section

- Required for each new account, to be completed and *signed by the Advisor*.
- Access the document **HERE**.
- Securely return the completed form via the Measured Risk Portfolios Dropbox **HERE**.

4. Create or Clone a Charles Schwab Account

- Use the digital workflow found in the Account Management tab in the Charles Schwab Advisor Center.
- Ensure the client applies for *Level 2 options trading* (Spreads and Margin).
- Measured Risk Portfolios can assist with obtaining Level 2 approval for clients with limited options experience.

5. Provide Required Documentation

- Share Measured Risk Portfolios' ADV Parts 1 & 2 and all relevant disclosure documents with the client at time of presenting the strategy or with account application paperwork.
- A DocuSign package will be reviewed and signed by the client.
- Refer to the "Digital Workflow Instructional Video" for additional guidance.

6. Fund the Account

- Fund the account using the preferred method chosen during the account opening process.

7. Begin Trading

- Once the account is opened, funded, and approved for Level 2 options trading, trading will commence immediately.

Thank you for your business!

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