

Choice Trade 証券口座の開設

マニュアル

Ver3.0

◆目次

■ Choice Tradeとは、手続き準備	P3
■ 開設手続き中断後の再ログイン方法	P4～P5
■ 開設手続きのパスワードを忘れた場合	P6～P7
■ Choice Tradeへのアクセス方法	P8～P9
■ 開設手続き(1 Set-Up)	P10～P11
■ 開設手続き(2 Personal Info)	P12～P25
■ 開設手続き(3 Investment Profile)	P26
■ 開設手続き(4 Agreement)	P27～P29
■ 開設手続き(5 Review & Submit)	P30～P37
■ 申込完了後の流れ	P38
■ Choice Tradeからのメールについて	P39～P46

Choice Trade 証券口座の開設について

■ Choice Tradeとは・・・

- ・インターネットを使ったオンライントレードが簡単に可能
- ・株のトレード等が、低コストで手続きが可能
- ・オンライン証券市場では確実な実績を誇る
- ・リアルタイムで株式の売買が可能

<事前に以下証明書類(①と②から一つずつ)をご用意ください>

①本人確認書

- ・有効期限内のパスポート(顔写真のページ)
- ・国際運転免許証

②住所証明書

- ・残高証明書(英語のみ)
- ・公共料金(ガス・水道・電気、いずれか一点)の請求書※日本語原本と英語翻訳 両方必要
※口座開設者名義にて登録住所へ送られている3か月以内のもの

■ 証券口座開設手続きにあたり、以下の情報をご記入ください

○ 登録するメールアドレス

※@ezweb.ne.jp @docomo.ne.jp @softbank.ne.jpのメールアドレスは
Choice Tradeからのメールが受け取れない可能性があるため使用しないでください
(例:taro@yahoo.co.jp)

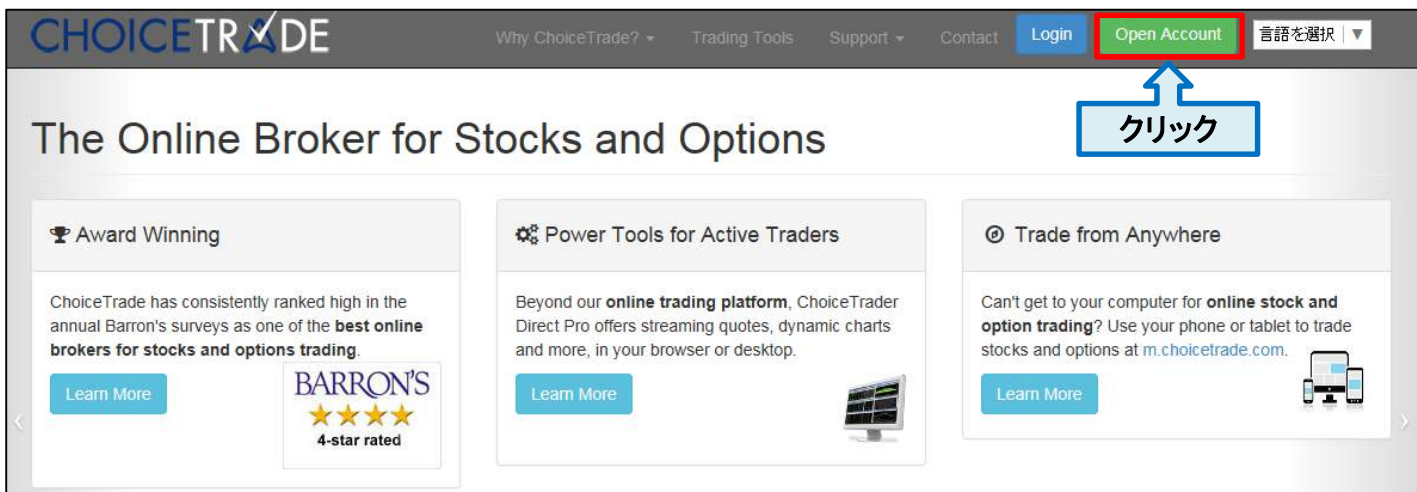
○ 開設手続きのパスワード

※アルファベット大文字＋小文字＋数字を含む8文字～20文字以内
(例:Acbd1234)

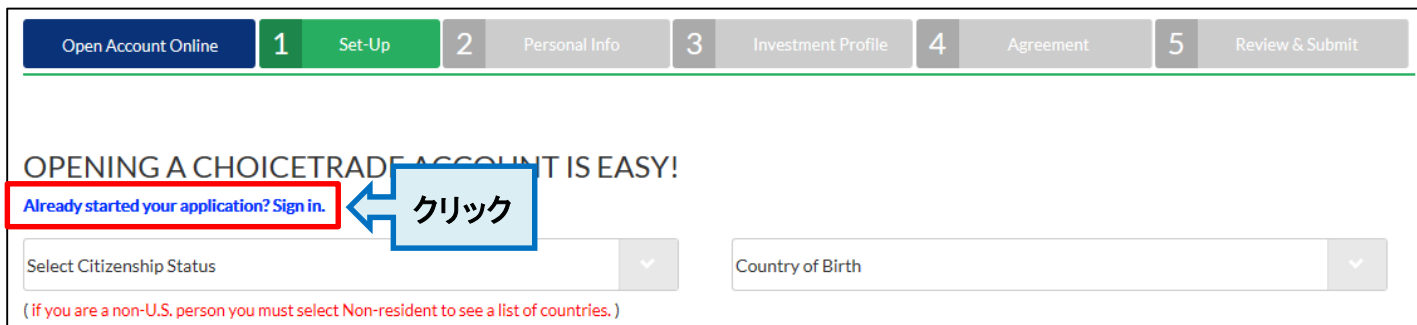
初めて手続きされる
方はChoice Tradeへの
アクセス方法P8～へ

■ 開設手続き中断後の再ログイン方法

開設手続きの途中で入力を中断し、あとで続きを入力したい場合、
 前回保存したページまで戻ることができます
 以下の手順に沿って、手続きを進めてください



「Open Account(口座開設)」をクリックしてください



「Already started your application? Sign in.(すでに開設手続きを始めていますか？
 ログインはこちら)」をクリックしてください

Open Account Online 1 Set-Up 2 Personal Info 3 Investment Profile 4 Agreement 5 Review & Submit

Login

Enter Your Email-id ← 登録したメールアドレスを入力

Enter Your Secret Word ← 開設手続きのパスワードを入力

Login Cancel Forget your Password?

クリック

「Enter Your Email-id (メールアドレスを入力)」に登録したメールアドレスを入力
 「Enter Your Secret Word (パスワードを入力)」に開設手続きのパスワードを入力
 「Login (ログイン)」をクリック

Open Account Online 1 Set-Up 2 Personal Info 3 Investment Profile 4 Agreement 5 Review & Submit

Welcome back!

Click below to resume an application already in progress.

You have application(s) completed or in progress. Click on any one to continue.

Individual Account (123456789012 - started on 2017-06-12 03:27:57)

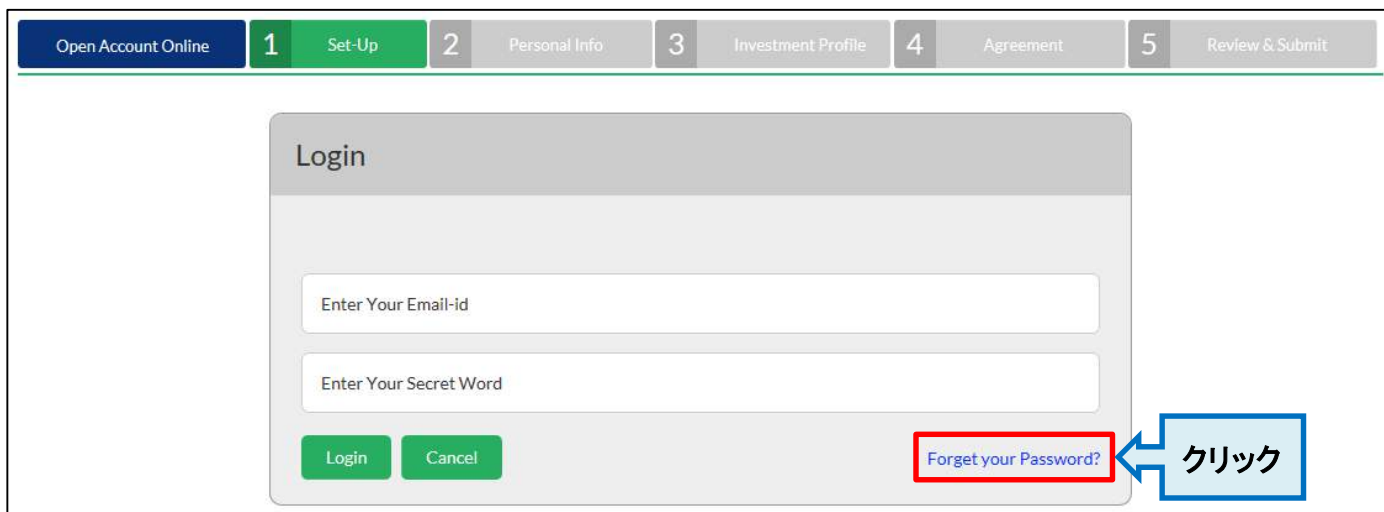
You have completed 2 of 5 steps; next we need you to provide us with your investment profile

Delete **Continue** ← クリック

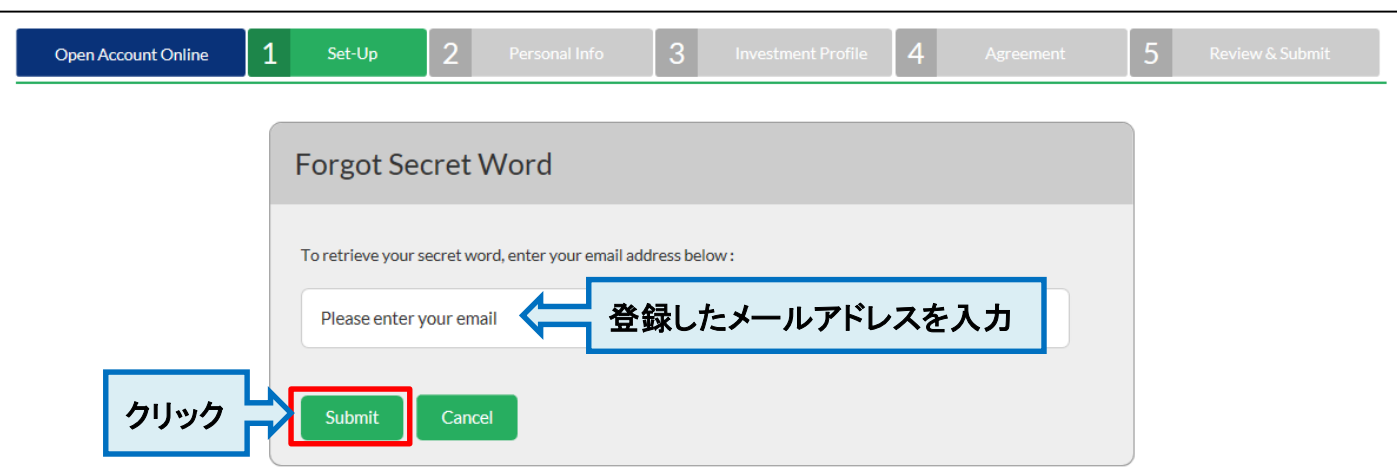
「Continue (続行)」をクリック

前回保存したページまで戻ることができます
 該当ページを参考に手続きを進めてください

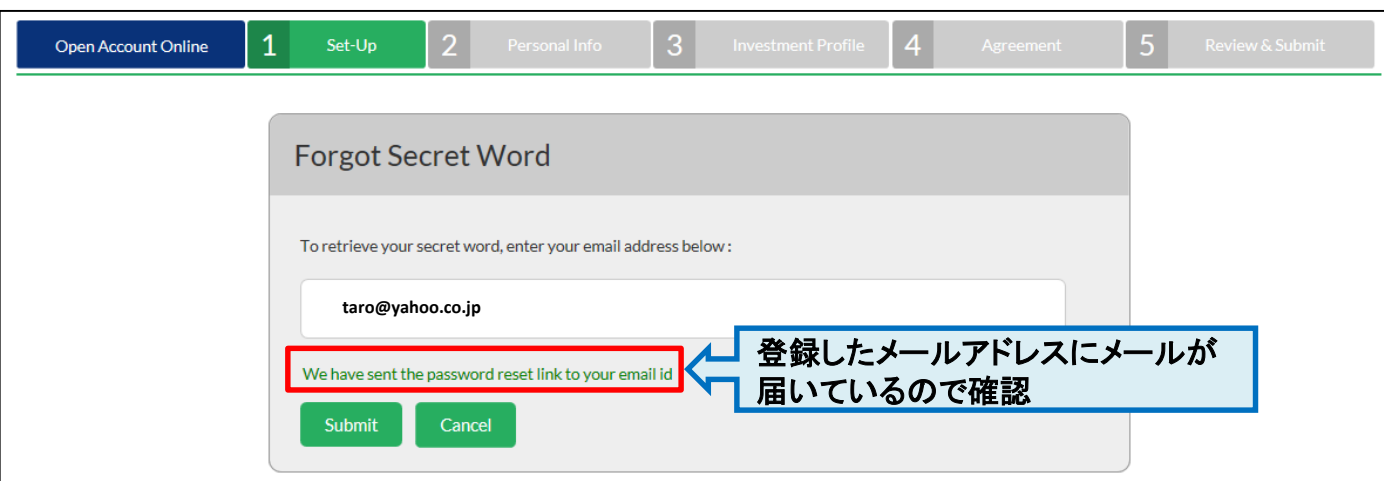
■ 開設手続きのパスワードを忘れた場合



「Forget your Password? (パスワードを忘れた)」をクリックしてください



「Please enter your email (メールアドレスを入力してください)」に登録したメールアドレスを入力
「Submit (提出)」をクリックしてください



○メールの内容

<件名>

Forgot Password For ChoiceTrade

<本文>

Dear ChoiceTrade Client:

Click on this link to reset your password: [Reset Password](#) **クリック**

If you did not try to change your password, please contact us at service@choicetrade.com immediately.

Please do reply to this email as it will not be monitored.

「Reset Password(パスワードを再設定)」をクリックしてください

Open Account Online	1	Set-Up	2	Personal Info	3	Investment Profile	4	Agreement	5	Review & Submit
---------------------	---	--------	---	---------------	---	--------------------	---	-----------	---	-----------------

Forgot Secret Word

Secret Word*

Confirm Secret Word*

Submit **Cancel**

**新しい開設手続きのパスワードを入力
※アルファベット大文字+小文字+数字を含む8文字～20文字**

新しい開設手続きのパスワードを再度入力

クリック

「Secret Word(パスワード入力)」に新しい開設手続きのパスワードを入力

「Confirm Secret Word(パスワードを再度入力)」に新しい開設手続きのパスワードを再度入力

「Login(ログイン)」をクリック

Open Account Online	1	Set-Up	2	Personal Info	3	Investment Profile	4	Agreement	5	Review & Submit
---------------------	---	--------	---	---------------	---	--------------------	---	-----------	---	-----------------

クリック

Your password has been changed successfully. Click [here](#) to login.

新しいパスワードの設定完了

「Your password has been changed successfully.(パスワードの変更が完了しました)」
「here(こちら)」をクリックしログインしてください ※P5へ

■Choice Tradeへのアクセス方法

1. 検索サイトに「Choice Trade」と入力し、検索ボタンを押してください
または、<https://www.choicetrade.com/> にアクセスしてください

Choice Trade

①「Choice Trade」と入力

約292,000,000件
検索ソール

choice trade口座開設方法 choice tradeとは で検索

ChoiceTrade - Best Online Trading Trade Online Stock Trading ...

www.choicetrade.com/ - キャッシュ

Online Stock Trading, online trading platform, Online Broker For Stocks, Best online broker, on line options trading, option trading software, penny stock trading, internet stock trading brokers, buy direct access discount commission.

[ChoiceTrade](#) [Pricing](#)
[Open Account](#) [Loading](#)
[Contact](#) [Fund](#)

チョイストレード | 全ての優良FX自動売買EAを無料使用可能！

choice-trade.com/ - キャッシュ

Choice-Trade.(チョイストレード)では、全ての 優良FX自動売買ソフト(EA)が無料で使用可能です！
初心者様にも優しい24時間サポートサービス！戦略を選択し、FXシステムトレードで勝利を目指せ！

Choice-Trade(チョイストレード)のサービス内容と特徴 | チョイストレード

choice-trade.com/service/ - キャッシュ

自動売買システム(EA)を運用する上で大切なこと。それは「システムの成績」そして「システム自身のコスト」です。通常、EAは購入してしまえばあとは返品不可。どんなダメEAだったとしても、購入して使ってみないと真の実力は分かりません。しかし、その購入 ...

2.「Open Account」をクリックしてください

CHOICETRADE

Why ChoiceTrade? + Trading Tools Support + Contact [Login](#) [Open Account](#) ②クリック

The Online Broker for Stocks and Options

Award Winning

ChoiceTrade has consistently ranked high in the annual Barron's surveys as one of the **best online brokers for stocks and options trading**.

[Learn More](#)

BARRON'S
★★★★
4-star rated

Power Tools for Active Traders

Beyond our **online trading platform**, ChoiceTrader Direct Pro offers streaming quotes, dynamic charts and more, in your browser or desktop.

[Learn More](#)

Trade from Anywhere

Can't get to your computer for **online stock and option trading**? Use your phone or tablet to trade stocks and options at [m.choicetrade.com](#).

[Learn More](#)

Thinking about it? Test drive our online trading platform for free. You get \$100,000 in virtual funds in your demo account. Not real money. Sorry.

[Register for a Virtual Account](#)

* See our Pricing page for full details.
Barron's is a registered trademark of Dow Jones & Company © 2012.

Legal

User Agreement
Customer Agreement
Risk Disclosure
Business Continuity
Privacy & Security
Margin & Option Disclosure
Order Routing Report

Accounts

Open an Account
Log In
Contact Us

Follow Us

f t+ in

Choice Tradeの申込み画面が開きます

CHOICETRADE

English

SECURE SITE
Secured by SSL

Open Account Online 1 Set-Up 2 Personal Info 3 Investment Profile 4 Agreement 5 Review & Submit

OPENING A CHOICETRADE ACCOUNT IS EASY!

[Already started your application? Sign In.](#)

Select Citizenship Status

(If you are a non-U.S. person you must select Non-resident to see a list of countries.)

Select the type of account you wish to open.

☒ Individual ②
☐ Joint ②
☐ Custodial ②
☐ IRA ②
☐ Specialty Accounts

Email* ② Confirm Email*

Secret Word* ② Confirm Secret Word* ②

Where did you hear about us?

☐ Click here to receive notices about investment and product education via email.

Promotion Code

[Continue >](#)

■開設手続き(1 Set-Up)

入力画面A

OPENING A CHOICETRADE ACCOUNT IS EASY!

[Already started your application? Sign in.](#)

Non Resident

▼

(if you are a non-U.S. person you must select Non-resident to see a list of countries.)

Country of Birth

▼


Country of Residence


▼

Country of Citizenship

▼


Select the type of account you wish to open.

☒ Individual 


☐ Joint 

☐ Specialty Accounts


Email*




Secret Word*



Confirm Email*



Confirm Secret Word*



Where did you hear about us?

▼

☐ [Click here to receive notices about investment and product education via email.](#)

Promotion Code

Continue >

入力画面A

■ New User Registration. ③～⑮を入力してください

The screenshot shows the 'New User Registration' form with the following annotations:

- ③「Non Resident(非居住者)」を選択**: Points to the 'Non Resident' dropdown menu.
- ④JAPANを選択**: Points to the 'JAPAN' dropdown menu for 'Country of Birth'.
- ⑤JAPANを選択**: Points to the 'JAPAN' dropdown menu for 'Country of Residence'.
- ⑥JAPANを選択**: Points to the 'JAPAN' dropdown menu for 'Country of Citizenship'.
- ⑦「Individual(個人口座)」を選択**: Points to the 'Individual' radio button under 'Select the type of account you wish to open'.
- ⑧⑨メールアドレスを入力**: Points to the 'Email' and 'Confirm Email' input fields.
- ⑩開設手続きのパスワードを入力(※)**: Points to the 'Secret Word' input field.
- ⑪⑩を再入力**: Points to the 'Confirm Secret Word' input field.
- ⑫「Friend(友人)」を選択**: Points to the 'Friend' dropdown menu.
- ⑬✓をいれる**: Points to the checkbox 'Click here to receive notices about investment and product education via email.'.
- ⑭空白のまま**: Points to the 'Promotion Code' input field.
- ⑮クリック**: Points to the 'Continue >' button.

<選択事項>

- ③Citizenship Status(米国の市民権): 「Non Resident(非居住者)」を選択してください
- ④Country of Birth(生まれた国): 「JAPAN(日本)」を選択してください
- ⑤Country of Residence(居住国): 「JAPAN(日本)」を選択してください
- ⑥Country of Citizenship(市民権): 「JAPAN(日本)」を選択してください
- ⑦Select the type of account you wish to open(口座種別): 「Individual(個人口座)」を選択してください
- ⑧Email(メールアドレス): ご自身の「メールアドレス」を入力してください
- ⑨Confirm Email(メールアドレス確認用): ⑧を再度入力してください
- ⑩Secret Word(パスワード): 開設手続きのパスワードを入力してください
(※) 8～20文字以内あるアルファベット(大文字)+(小文字)+(数字)
- ⑪Confirm Secret Word(パスワード確認用): ⑩を再度入力してください
- ⑫Where did you hear about us?(どこでChoice Tradeを知りましたか?): 「Friend(友人)」を選択してください
- ⑬Click here to receive notices about investment and product education via email.: メールによる情報を受け取る場合はチェックを入れてください(任意)
- ⑭Promotion Code: 空白のまま
- ⑮「Continue(続行)」をクリックしてください

入力画面B

Open Account Online	1	Set-Up	2	Personal Info	3	Investment Profile	4	Agreement	5	Review & Submit
---------------------	---	--------	---	---------------	---	--------------------	---	-----------	---	-----------------

Welcome . Please continue your application below.

Personal Information

Title	First Name*	Middle Name	Last Name*
Date Of Birth MM/DD/YYYY		Gender	
Marital Status		Number Of Dependents	
Government ID Number			

Permanent Address

Permanent Address	Address2
City	Select Country
Zip Code	Select State

☐ My mailing address is different

[Why isn't my country listed?](#)

[Why isn't my state listed?](#)

Contact Information

Mobile Phone	Evening Phone
--------------	---------------

<< Back Save And Continue >>

■ Personal information. ①⑥～②④を入力してください

The screenshot shows a web form titled 'Personal information' with a progress bar at the top indicating steps 3, 4, and 5. The form contains the following fields and callouts:

- ①⑥敬称:** A dropdown menu with options 'Mr. (男性)', 'Ms. (女性)', 'Mrs. (既婚女性)', and 'Dr. (博士・医者)'. Callout: 「Mr. (男性)」「Ms. (女性)」「Mrs. (既婚女性)」「Dr. (博士・医者)」より選択
- ①⑦名:** A text input field containing 'Taro'. Callout: ①⑦名
- ①⑧ミドルネーム:** A text input field that is empty. Callout: ①⑧ミドルネーム: 空白
- ①⑨姓:** A text input field containing 'Yamada'. Callout: ①⑨姓
- ②⑦生年月日 (月/日/年):** A date input field containing '04/24/1980'. Callout: ②⑦生年月日 (月/日/年)
- ②⑧性別:** A dropdown menu with options 'Male (男性)' and 'Female (女性)'. Callout: ②⑧性別: 「Male (男性)」「Female (女性)」より選択
- ②⑨扶養家族数:** A text input field containing '2'. Callout: ②⑨扶養家族数
- ②⑩婚姻状況:** A dropdown menu with options 'Single (独身)', 'Married (婚姻)', 'Divorced (離婚)', and 'Widow (死別)'. Callout: ②⑩婚姻状況: 「Single (独身)」「Married (婚姻)」「Divorced (離婚)」「Widow (死別)」より選択
- ②⑪国際ID番号:** A text input field containing 'MS1234567'. Callout: ②⑪国際ID番号: パスポート(旅券)番号を入力 (例)MS1234567

- ①⑥Title (敬称): 「Mr. (男性)」「Ms. (女性)」「Mrs. (既婚女性)」「Dr. (博士・医者)」より選択してください
- ①⑦First name (名): 「名」を入力してください※英字
- ①⑧Middle Name (ミドルネーム): 空白のまま
- ①⑨Last Name (姓): 「姓」を入力してください※英字
- ②⑦Date of Birth (生年月日): 「生年月日」を入力してください
※月/日/年の順に入力してください
例: 1970年4月20日の場合 ⇒ 04/20/1970 ※ / (スラッシュ)は入力不要
- ②⑧Gender (性別): 「Male (男性)」「Female (女性)」より選択してください
- ②⑩Marital Status (婚姻状況): 「Single (独身)」「Married (婚姻)」「Divorced (離婚)」「Widow (死別)」より選択してください
- ②⑨Number Of Dependents (扶養家族数): 扶養家族の人数を入力してください
- ②⑪Government ID Number (国際ID番号): パスポート(旅券)番号を入力してください

■ Permanent Address. ②⑤～③④を入力してください

Permanent Address

1-32-45-506, Sakanoue-cho ← ②⑤住所: ※(例) 参照

Address2 ← ②⑥住所2: 空白

Higashi-shi, Tokyo ← ②⑦市区郡、都道府県: ※(例) 参照

JAPAN ← ②⑧国: 「JAPAN」を選択

Why isn't my country listed?

0123456 ← ②⑨郵便番号

Select State ← ③⑩州: 未選択

Why isn't my state listed?

☐ My mailing address is different

③①書類送付先と上記住所が異なる場合はチェック

Contact Information

819012345678

813123456

<< Back Save And Continue >>

③④クリック

③②携帯電話番号:
「国番号(81)」+ 携帯電話番号先頭の
「0」を省いて入力

③③夜間連絡先:
「国番号(81)」+ 電話番号先頭の「0」を省いて入力

※(例) 住所記入の例

〒012-3456 ⇒ ②⑨ Zip Code → 0123456
東京都東市 ⇒ ②⑦ City → Higashi-shi, Tokyo
坂之上町 1-32-45-506 ⇒ ②⑤ Permanent Address → 1-32-45-506, Sakanoue-cho

※英数字で入力

②⑤Permanent Address(住所1): 「丁目-番地、町村」を入力してください

②⑥Address 2(住所2): 空白のまま

②⑦City(市区郡、都道府県): 「市区郡、都道府県」を入力してください

②⑧Select Country(国): 「JAPAN」を選択してください

②⑨Zip Code(郵便番号): 「郵便番号」を入力してください

③⑩State(州): 未選択、「--Select State--」のまま

③①My Mailing Address is Different: 空白のまま

(書類送付先と上記登録住所が異なる場合はチェックを入れてください(P15参照))

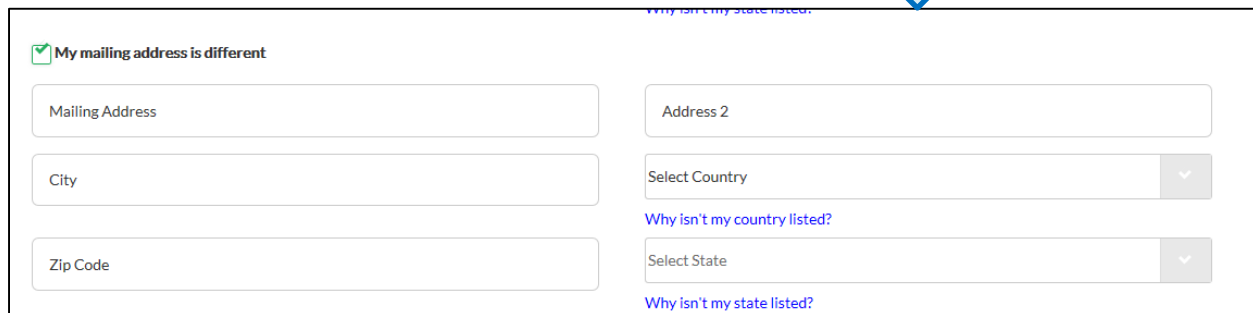
③②Mobile Phone(携帯電話番号) 「国番号(81)」+ 携帯電話番号先頭の「0」を省いて入力してください

③③Evening Phone(夜間連絡先) 「国番号(81)」+ 電話番号先頭の「0」を省いて入力してください

③④「Save And Continue」をクリック

■ ③①にチェックを入れた場合・・・

送付先に指定する住所を入力
※送付先の住所証明書が別途必要になります



Why isn't my state listed?

☒ My mailing address is different

Mailing Address

City

Zip Code

Address 2

Select Country

Why isn't my country listed?

Select State

Why isn't my state listed?

※(例) 住所記入の例

〒012-3456	⇒	②⑨ Zip Code	→	0123456
東京都東市	⇒	②⑦ City	→	Higashi-shi, Tokyo
坂之上町 1-32-45-506	⇒	②⑤ Permanent Address	→	1-32-45-506, Sakanoue-cho

入力画面 c

Open Account Online 1 Set-Up 2 Personal Info 3 Investment Profile 4 Agreement 5 Review & Submit

Thanks Taro Yamada . Now we need your financial Information

Employment.

Employment Status ▼

Financial Information.

Primary Source of Income ▼

Primary Source of Wealth ▼

Annual Income ▼

Net Worth ▼

Liquid Assets ▼

Tax Bracket ▼

<< Back Save And Continue >>

③⑤就業状況:
「V」をクリックし、該当するものを一つ選択

③⑤Employment Status
(就業状況)

Open Account Online 1 Set-Up 2 Personal Info 3 Investment Profile 4 Agreement 5 Review & Submit

Thanks yamada taro . Now we need your financial Information

Employment.

Employment Status ▼

Employment.

Employment Status

Employed

Self Employed

Retired

Homemaker

Student

Unemployed

Years Employed

「Employed(従業員)」
「Self Employed(自営業)」
「Retired(退職)」
「Homemaker(主婦)」
「Student(学生)」
「Unemployed(未就業)」より選択

<< Back Save And Continue >>

Employment Status (就業状況) で「Employed (従業員)」「Self Employed (自営業)」を選択された方

Open Account Online

1Set-Up

2Personal Info

3Investment Profile

4Agreement

5Review & Submit

Thanks Taro Yamada . Now we need your financial Information

Employment.

Employed

Occupation

Years Employed

Company Name

Type of Business

Business Address

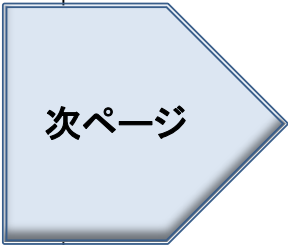
City

Select Country

Zip Code

Select State

Business Phone



Employment Status (就業状況) で「Retired (退職)」「Homemaker (主婦)」を選択された方

Open Account Online

1Set-Up

2Personal Info

3Investment Profile

4Agreement

5Review & Submit

Thanks Taro Yamada . Now we need your financial Information

Employment.

Homemaker

Financial Information.

Primary Source of Income

Primary Source of Wealth

Annual Income

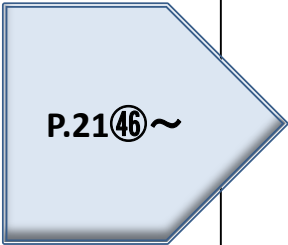
Net Worth

Liquid Assets

Tax Bracket

<< Back

Save And Continue >>



入力画面 c

■ Contact Information . ③⑥～④⑤を入力してください

Thanks Taro Yamada . Now we need your financial Information

Employment:

Employed	▼
Sales	▼
5	
ABC inc,	
education business	
1-1-1,Sakanoue-cho	
Higashi-cho,Tokyo	
JAPAN	▼
012345	
Select State	▼
81678901234	

③⑥職業を選択: (P19参照)

③⑦勤続年数を入力

③⑧会社名を英語で入力 (※)

③⑨業種を英語で入力

④⑩勤務先住所: 番地・町名を入力

④⑪勤務先住所: 市区郡・都道府県を入力

④⑫JAPANを選択

④⑬勤務先住所の郵便番号: 空白

④⑭州: 未選択

④⑮勤務先の電話番号を入力

※全て英語でご入力ください

③⑥Occupation (職業): 「職業」を選択してください

③⑦Year Employed (勤続年数): 勤続年数を数字で入力してください

③⑧Company Name (会社名): 会社名を英語表記で入力してください

(※) 20文字しか入力できません

③⑨Type of Business (業種): 「業種」を入力してください

④⑩Business Address (勤務先住所): 「勤務先住所 (番地・町名)」を入力してください

④⑪City (市区郡、都道府県): 「市区郡・都道府県」を入力してください

④⑫Country (国): 「JAPAN (日本)」を選択してください

④⑬Zip Code (郵便番号): 空白 (※6桁までしか入力できないため)

④⑭State/Province (州): 未選択、「--Select State--」のまま

④⑮Business Phone (勤務先電話番号): 「国番号 (81)」+勤務先電話番号先頭の「0」を省いて入力してください

※詳細は
次ページ

※勤務先名、勤務先住所に文字制限がございます

入力できるところまで入力してください

入力画面 c ③⑥～④⑤の入力（詳細）

③⑥Occupation（職業）

Employment.

Employed

Occupation

Accounting
Agriculture
Banking and Finance
Clerical
Construction
Consulting
Customer Service - Call Center
Education
Engineer
Government
Healthcare
Hotel and Restaurant
Information Technology
Internet and E-commerce
Legal
Management and Executive
Manufacturing
Marketing
Media - Journalism
Non-profit
Real Estate
Retail
Sales
Science
Security
Sports
Travel and Tourism
Wholesale

Select State

③⑥「V」をクリックし、該当する職業を一つ選択

- Accounting（会計士）
- Agriculture（農業）
- Banking and Finance（銀行員・金融）
- Clerical（事務）
- Construction（建設）
- Consulting（コンサルタント）
- Customer Service-Call Center（顧客サービス・コールセンター）
- Education（教育）
- Engineer（技術者）
- Government（政府関連）
- Healthcare（医療機関）
- Hotel and Restaurant（ホテル・レストラン）
- Information Technology（情報技術）
- Internet and E-commerce（インターネット・eコマース）
- Legal（法律関連）
- Management and Executive（経営）
- Manufacturing（製造）
- Marketing（マーケティング）
- Media- Journalism（広報）
- Non-profit（NPO）
- Real Estate（不動産）
- Retail（小売り）
- Sales（販売）
- Science（科学）
- Security（セキュリティ）
- Sports（スポーツ関連）
- Travel and Tourism（旅行関連）
- Wholesale（卸売業）

Employment.

Employed

Sales

5

ABC inc.

③⑦勤続年数を数字で入力

③⑧会社名を英語で入力

(株)ABC

ACB(株)

ABC Co., Ltd または ABC Inc.

Sales

5

ABC inc.

Type of Business

Business Address

City

Select Country

Zip Code

③⑨業種を英語で入力
(例)
経理: accounting
一般事務: administrative
接客: sales attendant
営業職: sales
教師: teacher
医者: doctor
役員: director

1-23-4. Sakanoue-cho

Higashi-shi, Tokyo

JAPAN

Select State

8131234567

④⑩勤務先住所: 番地・町名を入力

④⑪勤務先住所: 市区郡・都道府県を入力

④⑫JAPANを選択

④⑬勤務先住所の郵便番号: 空白

④⑭州: 未選択

④⑮勤務先の電話番号:
「国番号(81)」+電話番号先頭の「0」を省いて入力

■ Financial Information. ④⑥～⑤⑩を入力してください

The screenshot shows a form titled "Financial Information." with the following fields and callouts:

- ④⑥ Primary Source of Income (主な収入源) を選択 (P22参照)**: Callout for the "Job" dropdown menu.
- ④⑦ Personal Income/Savings を選択**: Callout for the "Personal Income/Saving" dropdown menu.
- ④⑨ Liquid Assets (現金を含む金融資産) 米ドル換算で選択してください (P23参照)**: Callout for the "Liquid Assets" dropdown menu.
- ④⑧ Annual Income (年収) 米ドル換算で「年収」を選択してください (P22参照)**: Callout for the "Annual Income" dropdown menu.
- ⑤⑩ Net Worth (純資産) 米ドル換算で「資産(不動産を含む(持ち家を除く))から負債(クレジットカードやローン)を差し引いた金額」を選択してください (P23参照)**: Callout for the "Net Worth" dropdown menu.
- Tax Bracket 「Unknown(不明)」を選択**: Callout for the "Tax Bracket" dropdown menu.

At the bottom of the form are two buttons: "<< Back" and "Save And Continue >>".

④⑥ Primary Source of Income (主な収入源): 主な収入源より選択してください

④⑦ Primary Source of Wealth (主な財産源):

「Personal Income/Savings (個人所得/貯蓄)」「Inheritance (相続)」

「Sale of Business (出資企業)」より選択してください

④⑧ Annual Income (年収): 米ドル換算で「年収」を選択してください

④⑨ Liquid Assets (現金を含む金融資産): 米ドル換算で「現金を含む金融資産」を選択してください

⑤⑩ Net Worth (純資産):

米ドル換算で「資産(不動産を含む(持ち家を除く))から負債(クレジットカードやローン)を差し引いた金額」を選択してください

• Tax Bracket (税率区分): 「Unknown(不明)」を選択してください

「Save And Continue (保存と実行)」をクリックしてください

※詳細は
次ページ

④⑥Primary Source of Income
(主な収入源)

Financial Information.

Primary Source of Income

Job
Personal Savings
Spouse/Parent
Security
Inheritance
Investment
Retirement Plan
Real estate investment
Stock retirement annuity
Family wealth
Passive income
Royalties
Property income
Portfolio income
Other

④⑥Primary Source of Income (主な収入源)を選択

- Job (賃金・報酬)
- Personal Savings (個人貯蓄)
- Spouse (配偶者) / Parent (親)
- Security (社会保障年金)
- Inheritance (相続)
- Investment (投資)
- Retirement Plan (退職金)
- Real estate investment (不動産投資)
- Stock retirement annuity (企業年金)
- Family wealth (家族の資産)
- Passive income (受動的な収入)
- Royalties (印税)
- Property income (財産所得)
- Portfolio income (ポートフォリオ収入)
- Other (その他)

※「Retired (退職)」「Homemaker (主婦)」を選択された方は「Job (賃金・報酬)」以外の選択肢からお選びください

④⑦Primary Source of Wealth
(主な財産源)

Financial Information.

Job

Primary Source of Wealth

Personal Income/Saving
Inheritance
Sale of Business

Liquid Assets

Tax Bracket

Net Worth

<< Back Save And Continue >>

④⑦Personal Income/Savingを選択

④⑧Annual Income
(年収)

Financial Information.

Job

Personal Income/Saving

Annual Income

\$0 - \$24,999
\$25,000 - \$74,999
\$75,000 - \$199,999
\$200,000 - \$499,999
\$500,000 - \$999,999
over \$1,000,000

<< Back Save And Continue >>

④⑧Annual Income

該当する年収を選択 (※ \$1 = 110円 計算)

- \$0 - \$24,999 (0円 ~ 274万円以下)
- \$25,000 - \$74,999 (275万円以上 ~ 824万円以下)
- \$75,000 - \$199,999 (825万円以上 ~ 2,199万円以下)
- \$200,000 - \$499,999 (2,200万円以上 ~ 5,499万円以下)
- \$500,000 - \$999,999 (5,500万円以上 ~ 1億999万円以下)
- Over \$1,000,000 (1億1,000万円以上)

④⑨Liquid Assets (現金を含む金融資産)

Job

Personal Income/Saving

\$25,000 - \$74,999

Net Worth

<< Back Save And Continue >>

Liquid Assets

- \$0 - \$19,999
- \$20,000 - \$49,999
- \$50,000 - \$149,999
- \$150,000 - \$499,999
- \$500,000 - \$999,999
- Over \$1,000,000

④⑨Liquid Assets

現金を含む金融資産を選択してください (※\$1 = 110円 計算)

\$0 - \$19,999 (0円 ~ 219万円以下)

\$20,000 - \$49,999 (220万円以上 ~ 549万円以下)

\$50,000 - \$149,999 (550万円以上 ~ 1,649万円以下)

\$150,000 - \$499,999 (1,650万円以上 ~ 5,499万円以下)

\$500,000 - \$999,999 (5,500万円以上 ~ 1億999万円以下)

Over \$1,000,000 (1億1,000万円以上)

⑤⑩Net Worth (純資産)

Financial Information

Personal Income/Saving

\$25,000 - \$74,999

\$20,000 - \$49,999

Net Worth

- \$0 - \$19,999
- \$20,000 - \$49,999
- \$50,000 - \$149,999
- \$150,000 - \$499,999
- \$500,000 - \$999,999
- Over \$1,000,000

\$50,000 - \$149,999

Tax Bracket

choiceTrade. All rights reserved.

⑤⑩Net Worth(純資産) (※\$1 = 110円 計算)

資産(不動産含む(持ち家を除く))から負債(クレジットカードやローン)を差し引いた金額を選択してください

\$0 - \$19,999 (0円 ~ 219万円以下)

\$20,000 - \$49,999 (220万円以上 ~ 549万円以下)

\$50,000 - \$149,999 (550万円以上 ~ 1,649万円以下)

\$150,000 - \$499,999 (1,650万円以上 ~ 5,499万円以下)

\$500,000 - \$999,999 (5,500万円以上 ~ 1億999万円以下)

Over \$1,000,000 (1億1,000万円以上)

※④⑨Liquid Assets と同額か、多く設定してください

Tax Bracket (税率区分)

Tax Bracket

\$50,000 - \$149,999

Unknown

<< Back Save And Continue >>

「Unknown」を選択

「Save And Continue」をクリック

Open Account Online
1 Set-Up
2 Personal Info
3 Investment Profile
4 Agreement
5 Review & Submit

加入者情報

Welcome Taro Yamada. Next, we need to know if you are affiliated with any of the following.

Affiliation Information:

Are you or a member of your household a director, 10% shareholder, or officer of a publicly traded company?

☐ Yes ☒ No ← 51.「No」を選択

Are you or a member of your household affiliated or employed by a registered broker/dealer, insurance company, bank, investment adviser or any exchange or self-regulatory organization, including the SEC, FINRA, NFA or SIPC?

☐ Yes ☒ No ← 52.「No」を選択

Is this application being submitted on behalf of a foreign shell bank?

☐ Yes ☒ No ← 53.「No」を選択

Is this account owner affiliated with a foreign shell bank?

☐ Yes ☒ No ← 54.「No」を選択

Does the account owner offer services to a foreign shell bank?

☐ Yes ☒ No ← 55.「No」を選択

Have you ever been the subject of a bankruptcy proceeding, receivership, or similar action?

☐ Yes ☒ No ← 56.「No」を選択

Have you ever been in a legal dispute, arbitration, or reparations action related to a securities or commodity account?

☐ Yes ☒ No ← 57.「No」を選択

Have you ever closed, or left dormant, an account with an unpaid balance at a securities or commodity firm?

☐ Yes ☒ No ← 58.「No」を選択

Have you or will you receive funds from any person or entity who is not an owner of this account that will be used to fund this account during the life of the account? (If you are going to fund the account at any time with some other person's money, that person cannot do business with you.)

☐ Yes ☒ No ← 59.「No」を選択

Is this application being submitted on behalf of a Foreign Financial Institution?

☐ Yes ☒ No ← 60.「No」を選択

Is this application being submitted on behalf of a current or former senior political figure (see Definition) or an immediate family member or close associate?

☐ Yes ☒ No ← 61.「No」を選択

Ownership Disclosure:

☐ Under rule 14b-1(c) of the Securities Exchange Act of 1934, we are required to disclose to an issuer the name, address and security position of our customer who are beneficial owner of that issuer's securities unless the customer objects. Please check here if you do NOT want ownership disclosed.

☒ I have read and agree with the disclosure of ownership information. ← 62. 空白

☒ I have read and agree with the disclosure of ownership information. ← 63. ✓を入れる

<< Back Save And Continue >> ← 64.「Save And Continue」をクリック

51～61.「No(いいえ)」を選択してください

62.空白のまま

63.「チェック」を入れてください

64.「Save And Continue(保存と続行)」をクリックしてください

口座の内容

Welcome Taro Yamada. Now consider the option-trading and margin-trading capabilities you wish to have for your account. Your option-trading experience should match your desired level of option trading. If you have no experience, you will not be able to attain the higher levels of option trading.

Account Privileges

Select an account profile:

☐ CashMargin

☒ Cash

65.「Cash」を選択

CashMargin accounts have additional privileges over Cash Accounts. Roll over icon for details.

Will this be a day-trading account? :

☐ Yes

☒ No

66.「No」を選択

Will you trade OTC stocks in this account? :

☒ Yes

☐ No

67.「Yes」を選択

Please specify your desired option trading level for this account. Most levels of option trading capability require a speculative investment objective with the exception of Covered Calls. Please indicate your desired degree of option trading, below.

Specific Option Objective and Requested Option Trading Level

Choose one:

☐ Objective: Income : Level 1:Write Covered Calls

☒ Objective: Speculation : Level 2:Level 1 + Buy calls and puts

68.「Objective:Speculation Level 2:Level 1 + Buy calls and puts」に✓を入れる

☐ Objective: Speculation : Level 3:Level 2 + Debit Spreads

☐ Objective: Speculation : Level 4:Level 3 + Credit Spreads

☐ Objective: Speculation : Level 5:Level 4 + Uncovered Equity Options

☐ I do not wish to add options trading capability to this

Previous Options Experience

オプション取引経験について

Check all that apply (must check at least one box per column)

Using Equity Options

Using Index Options

I have traded a simple option(bought a call or put option) ...

☐

☐

I have traded a covered call option ...

☐

☐

I have traded a complex option strategy(spread or comb ...

☐

☐

I have traded an uncovered option (naked short) ...

☐

☐

I have no options experience ...

☒

☒

69.✓を選択

70.✓を選択

<< Back

Save And Continue >>

71.「Save And Continue」をクリック

65.「Cash(現金)」を選択

66.「No(いいえ)」を選択してください

67.「Yes(はい)」を選択してください

68.～70.「チェック」を入れてください

71.「Save And Continue(保存と続行)」をクリックしてください

■ Affiliation Information. 72～79を入力してください

Open Account Online	1 Set-Up	2 Personal Info	3 Investment Profile	4 Agreement
5 Review & Submit				

We
obje

Previous Investment Experi

	Average	Average Number of Transactions/Year
Stocks:	10+	100-500
Options:	0	0
Bonds:	0	0
Mutual Funds	0	0

Investment Objective :

Please click on your most important investment objective. Certain objectives may be disabled because of previous input. Investing in penny stock, options (other than option level 1) and day trading of any security require an investment objective of "speculation". If speculation is not your objective and you wish to engage in this speculative activity, we are sorry we will not be able to accept your application.

Objective

- ☐ Investment Objective : Income. Risk Tolerance: Moderate. Time Horizon: Less than 5 Years:
(An investment objective of Income indicates that you seek to generate income from investments and are interested in investments that have historically demonstrated a lesser risk of loss of principal value than for the other objectives. Some examples of typical investments might include high quality, short-term fixed income products and covered call options. You are solely responsible for determining that each investment you make is consistent with your investment objectives and risk profile. ChoiceTrade will not monitor this for you.)
- ☐ Investment Objective : Capital Appreciation. Risk Tolerance :Aggressive.
(An investment objective of Capital Appreciation indicates that you seek to grow the principal value of your investments over time and are willing to invest in securities that have historically demonstrated an above average degree of risk of loss of principal value to pursue this objective. Some examples of typical investments might include common stocks, lower quality, medium-term fixed income products, equity mutual funds and index funds. You are solely responsible for determining that each investment you make is consistent with your investment objectives and risk profile. ChoiceTrade will not monitor this for you. If you choose this objective you will not be able to buy OTC(p
- ☒ Investment Objective : Speculation. Risk Tolerance: Aggressive.. Time Horizon: Less than 5 Years
(An investment objective of Speculation indicates that you seek a significant increase in the principal value of your investments and are willing to accept a corresponding greater degree of risk by investing in securities that have historically demonstrated a high degree of risk of loss of principal value to pursue this objective, sometimes in excess of your principal investment. You may seek to take advantage of short-term trading opportunities, which may involve establishing and liquidating positions quickly. Some examples of typical investments might include lower quality, long-term fixed income products, initial public offerings, volatile or low priced common stocks, the purchase or sale of put or call options, spreads, straddles and/or combinations on equities or indexes, and the use of short-term or day trading strategies. You are solely responsible for determining that each investment you make is consistent with your investment objectives and risk profile. ChoiceTrade will not monitor this for you. If you wish to trade penny stocks or options (other than covered calls), or if you wish to day trade (any type of security) this the only objective we will accept before your account is permitted to trade in these speculative securities.)

Document Delivery:

I agree to receive the following documents by email rather than postal mail (there are additional fees to receive paper documents by mail).

- ☒ Trade Confirmations by email.
- ☒ Account Statements by email.
- ☒ Proxy Statements by email.
- ☒ Prospectuses by email.
- ☒ Tax documents by email.

Account Transfer :

Will you transfer your account from another financial institution?
(Please note that we do not accept non-DTC eligible stocks, no

☐ Yes ☒ No

<< Back Save And Continue >>

■ Affiliation Information. 80～83を入力してください

Open Account Online

1 Set-Up

2 Personal Info

3 Investment Profile

4 Agreement

5 Review & Submit

Thanks Taro Yamada. Now we need you to review and agree to some terms and conditions to each agreement below. (Please open each tab and check the box)

Customer Agreement

Download Agreement

☒ I have read and understand the Active Trading Risk Disclosure Statement, the Margin Disclosure Statement and the ChoiceTrade Privacy Statement. I acknowledge that I have read and understand the Active Trading Risk Disclosure Statement, the Margin Disclosure Statement and the ChoiceTrade Privacy Statement. I understand and acknowledge that (i) this account application is not made pursuant to any solicitation, (ii) ChoiceTrade is not affiliated with or an agent of its clearing firm, and (iii) nothing herein is an offer or solicitation of any security, product or service in any jurisdiction where their offer or sale would be contrary to local law or regulation. I acknowledge that ChoiceTrade does not give investment, tax, legal or accounting advice with respect to the potential value or suitability of a particular security or investment strategy.

Fee acknowledgement

Some platforms involve a monthly Service Fee (please review the Commission and Fee Schedule). I acknowledge and agree to pay the Service Fee by authorizing ChoiceTrade to debit my account. I acknowledge that a finder's fee may be paid pursuant to agreement.

New Account Application

Options Agreement

Certification of Taxpayer ID number (for Tax Purposes)

<< Back

Save And Continue >>

The screenshot shows the 'Vision Options Supplement' document. At the top, there are navigation tabs: 'Customer Agreement', 'New Account Application', and 'Options Agreement' (which is selected). The document content includes the Vision logo, the title 'Options Supplement', and introductory text about trading options. A blue box with a green checkmark and an arrow points to the text '82. ✓を入れる' (Enter checkmark), which is positioned over the 'I AGREE TO ALL' line of the agreement. A red box with a red arrow points to the text '83. 「Certification of Taxpayer ID number」をクリック (納税者ID番号の取り扱いについて)' (Click on 'Certification of Taxpayer ID number' (Regarding the handling of taxpayer ID number)), which is positioned over the 'Certification of Taxpayer ID number' link at the bottom of the document. Below the document, there are buttons for '<< Back' and 'Save And Continue >>'. The footer text reads 'Copyright 2017 IBC Consulting, LLC'.

Customer Agreement

New Account Application

Options Agreement

Certification of Taxpayer ID number (Substitute W-9) (please skip this section if you are not a U.S. Person for Tax Purposes)

☒ Check (For U.S. Persons only) that you are exempt from backup withholding. (please skip this section if you are not a U.S. Person for Tax Purposes)

84.✓を入れる

Under penalty of perjury I certify that:

1. The number shown on this application is my correct taxpayer identification number (or I am waiting for a number to be issued to me) and

☒ I agree with the above certification. I acknowledge that I must make the declaration contained in the perjury statement of the IRS form W8-BEN and that I make this declaration by my signature below. I hereby agree to submit my form W8-BEN electronically and permit ChoiceTrade to share it with its clearing firm.

<< Back

Save And Continue >>

86.「Save And Continue」をクリック

Open Account Online

1 Set-Up

2 Personal Info

3 Investment Profile

4 Agreement

5 Review & Submit

Thanks Taro Yamada. Now we need you to review and approve the following data agreements.

NYSE/AMEX Exchange Agreement

NYSE and AMEX Agreement for Market Data Display Services(Non-Professional Subscriber Agreement)

choicetrade.com (Vendor) agrees to make Market Data available to you pursuant to the terms and conditions set forth in this agreement. By manifesting your assent in the space indicated below, you (Subscriber) agree to comply with those terms and

☒ I have received, read, understand and agree to be bound by the terms and conditions set forth in this section and the NYSE/AMEX agreement.

Subscriber certifies he/she qualifies as a "Non professional Subscriber" as defined above.

☒ Yes
 ☐ No

87.✓を入れる

88.「Yes」を選択

NASDAQ Exchange Agreement

Options (OPRA) Exchange Agreement

Pink Sheets Exchange Agreement

89.「NASDAQ Exchange Agreement」をクリック (NASDAQ株式交換契約)

<< Back

Save And Continue >>

Open Account Online
1
Set-Up
2
Personal Info
3
Investment Profile
4
Agreement
5
Review & Submit

Thanks Taro Yamada. Now we need you to review and approve the following data agreements.

NYSE/AMEX Exchange Agreement

NASDAQ Exchange Agreement

ON-LINE NASDAQ SUBSCRIBER AGREEMENT
DISCLOSURE - PLEASE READ
Subscribers to NASDAQ and LTP real-time data must sign The NASDAQ Stock Market, LLC (NASDAQ) Subscriber Agreement

☒ 90.✓を入れる

☒ 91.「Yes」を選択

Options (OPRA) Exchange Agreement

Pink Sheets Exchange Agreement

<< Back
Save And Continue >>

92.「Options(OPRA)Exchange Agreement」をクリック
(オプション株式交換契約について)

Thanks Taro Yamada. Now we need you to review and approve the following data agreements.

NYSE/AMEX Exchange Agreement

NASDAQ Exchange Agreement

Options (OPRA) Exchange Agreement

OPTIONS PRICE REPORTING AUTHORITY
ELECTRONIC FORM OF SUBSCRIBER AGREEMENT
IMPORTANT NOTICE: THIS AGREEMENT (THIS AGREEMENT) IS AN AGREEMENT BETWEEN YOU AND

☒ 93.✓を入れる

☒ 94.「Yes」を選択

Pink Sheets Exchange Agreement

<< Back
Save And Continue >>

95.「Pink Sheets Exchange Agreement」をクリック
(ピンクシート株式交換契約)

Pink Sheets Exchange Agreement

PINK SHEETS SUBSCRIBER AGREEMENT
ELECTRONIC FORM OF CUSTOMER AGREEMENT FOR PINK SHEETS MARKET DATA
THIS AGREEMENT IS AN AGREEMENT BETWEEN YOU AND THE Vendor, as indicated below, by and among the Vendor and the Subscriber, each as identified below.

☒ 96.✓を入れる

☒ 97.「Yes」を選択

<< Back
Save And Continue >>

■Review Application



Next, Taro Yamada please review your information.

Review Application

Registration :

Citizenship Status : non_resident
Type of Account : individual
How did you hear about us : Friend
Promotion Code : N/A

Personal Info : [Edit>>](#)

Title : Mr.
First Name : Taro
Middle Initial : N/A
Last Name : Yamada
Tax ID# :
Date of Birth : 04/24/1980
Marital Status : Married
Number of Dependents : 22

Permanent Address : [Edit>>](#)

Permanent Address : 1-32-45-506,Sakanoue-cho
Address 2 :
City : Higashi-shi,Tokyo
State :
Zip/Postal Code : 0123456
Country : JAPAN

Mailing Address : [Edit>>](#)

Same as Permanent Address

Contact Info : [Edit>>](#)

Day Time Phone: : 819012345678
Evening Phone : 813123456

Email : taro@yahoo.co.jp

メールアドレスの確認
※誤っている場合は「Edit>>」ボタンを押し、該当する箇所を修正してください

Employment : [Edit>>](#)

Employment Status : Employed
Occupation : Sales
Number of Years Employed: : 5
Employer Company Name ABC Inc.

Financial Info : [Edit>>](#)

Primary Source of Income : Job
Annual Income : \$0 - \$24,999
Liquid Assets : \$20,000 - \$49,999
Net Worth : \$20,000 - \$49,999

Affiliations : [Edit>>](#)
Member of your household, a director, 10% shareholder, or officer of a publicly traded company? : NO
Member of your household, affiliated or employed by a registered broker/dealer, an insurance company, bank, Investment Advisor or any exchange or self-regulatory organization, including the SEC, FINRA, NFA or CFTC? : NO
Is this application being submitted on the behalf of a foreign bank? : NO

Account Privileges : [Edit>>](#)
Investment Account Type : Cash Account Options

Account Transfer : [Edit>>](#)
Will you transfer your account from another financial institution? : NO

Previous Investment Experience : [Edit>>](#)
Stocks :
Years : 10+
Average Size : 100-500
Average Number of Transactions/Year : 1-50
Options :
Years :
Average Size :
Average Number of Transactions/Year :
Bonds :
Years : 0
Average Size : 0
Average Number of Transactions/Year : 0

Previous Options Experience : [Edit>>](#)

	Stock Options	Index Options
Buying (includes Debit Spread and some Straddles):	NO	NO
Covered Writing:	NO	NO
Spreads:	NO	NO
Uncovered Writing:	NO	NO
None:		

Investment Objectives : [Edit>>](#)
Investment Objective: Speculation. Risk Tolerance: Aggressive.. Time Horizon: Less than 5 Years

Specific Option Objective and Requested Option Trading Level : [Edit>>](#)
Objective: Speculation : Level 2: Level 1+ Purchases

<< Back

Save And Continue >>

 99.「Save And Continue」をクリック

99.入力内容を確認後、「Save And Continue（保存と続行）」をクリックしてください

Open Account Online	1 Set-Up	2 Personal Info	3 Investment Profile	4 Agreement
5 Review & Submit				

Sign and Submit

You have completed and accepted the following documents, agreements and disclosures.

New Account Form	NYSE/AMEX Exchange Agreement
	NASDAQ Exchange Agreement
Options Agreement	Options Exchange Agreement
	Pink Sheets Agreement

I represent that I have read, understand and agree to the Terms and Conditions governing this account as contained in the Customer Agreement. I agree to be bound by such Terms and Conditions as currently in effect and as may be amended from time to time without prior notice to me. I warrant that all the information I have entered on my application is correct to the best of my knowledge and belief. If there is a change in the future, I agree to promptly notify ChoiceTrade in writing. I acknowledge that I have read and understand the Active Trading Risk Disclosure Statement, the Margin Disclosure Statement and the ChoiceTrade Privacy Statement.

I understand and acknowledge that (i) this account application is not made pursuant to any solicitation, (ii) ChoiceTrade is not affiliated with or an agent of its clearing firm, and (iii) nothing herein is an offer or solicitation of any security, product or service in any jurisdiction where their offer or sale would be contrary to local law or regulation.

I acknowledge that ChoiceTrade does not give investment, tax, legal or accounting advice with respect to the potential value or suitability of a particular security or investment strategy.

Some platforms involve a monthly Service Fee (please review the Commission and Fee Schedule). I acknowledge and agree to pay the Service Fee by authorizing ChoiceTrade to debit my account. I acknowledge that a finder's fee may be paid pursuant to agreement. specialmsg Some platforms involve a monthly Service Fee (please review the Commission and Fee Schedule). By signing below, I acknowledge and agree to pay the Service Fee by authorizing ChoiceTrade to debit my account. I acknowledge that a finder's fee may be paid pursuant to an agreement.

I UNDERSTAND THAT THIS ACCOUNT IS GOVERNED BY AN ARBITRATION AGREEMENT WHICH IS SET FORTH IN PARAGRAPHS 18 AND 19 OF THE CUSTOMER AGREEMENT. I ACKNOWLEDGE RECEIPT OF THE ARBITRATION AGREEMENT AND THE CUSTOMER ACCOUNT AGREEMENT GOVERNING MY ACCOUNT.

Document Upload

You must submit the following required document(s). To avoid delays with your application, we prefer that you scan and upload your documents in PDF or image (jpg/img) format below. If you do not have the documents handy, please click the box below and email, fax or snail mail them to us. You can also log back into the application later to submit the documents. To log back in later, please click [HERE](#) and log in with your email address and secret word. (Please note that this log in is only to manage your account application. Once a new account number is issued to you, you will receive your trading log in ID and password.)

☐ I will submit the following document(s)

**証明書類を後で送付する場合は✓をいれて
100.(P34)に進んでください**

Government Identity Card

Please submit a copy of your government-issued photo ID such as a passport, national identity card or driver's license. Please do not send expired IDs as we will not be able to accept them. If the ID you submit does not contain your address or if it contains your old address, then please also submit a current utility bill such as a gas, electric or water bill that contains your name and current address.

Upload

Upload Upload or Drag & Drop Files

101.証明書類のPDFをアップロードしてください

Primary Account Owner

Print your name

Taro Yamada

**102.氏名を英語で入力してください
(例) Taro Yamada**

Draw your signature

Draw It

Clear

山田太郎

103.署名

<< Back

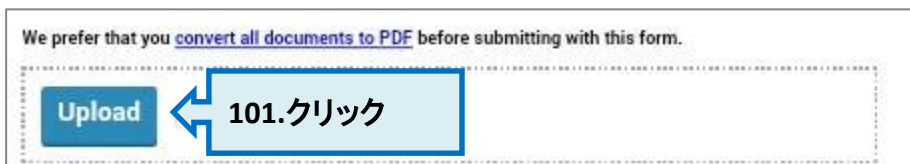
Save And Continue >>

104.「Save And Continue」をクリック

**※詳細は
次ページ**

■ We prefer that you [convert all documents to PDF](#) before submitting with this form.

101. 証明書類をアップロードしてください



101.Upload (アップロード) : 証明書類 (P3①と②) を添付してください

※クリック後の画面はパソコンやタブレットにより異なりますので、画面に従い操作してください

※証明書類を添付する場合、PDFを推奨しております

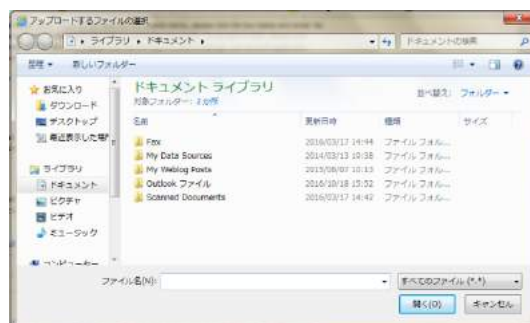
例: Android タブレット



写真機能…書類を撮影し、アップロードしてください

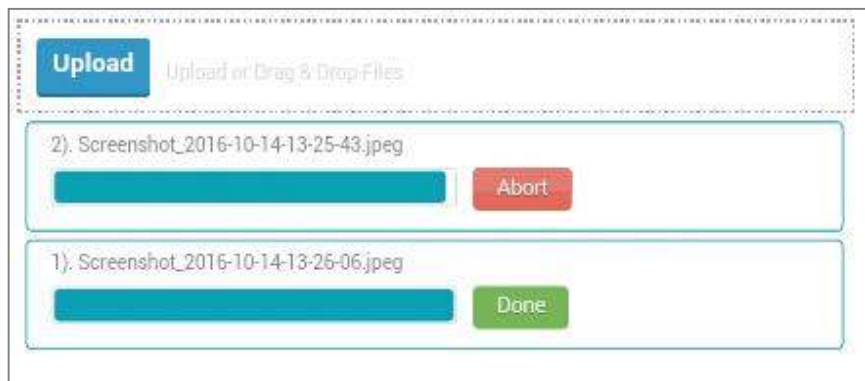
保存先…保存先から対象の書類を選択しアップロードしてください

例: パソコン



保存先…保存先から対象の書類を選択しアップロードしてください

例: アップロードされたデータの表示



※アップロードは4つまでとなります
容量は合計で3MBまでとなります



誤ってアップロードしてしまった場合

誤ってアップロードされた場合は画面左下の
前画面に戻らないと削除できません

<< Back

ボタンで

<< Back

で前画面に戻りP30～P31から手続きを行ってください



注意

操作途中に誤って **Save And Continue >>** ボタンを押してしまうと、手続き終了画面に移り、このページに戻ることができません
書類のアップロードや、署名欄が抜けていると不備となりますので、ご注意ください

※誤って手続き終了画面になってしまった場合は、Choice Tradeからの連絡をお待ちください

The screenshot shows a web form with the following elements:

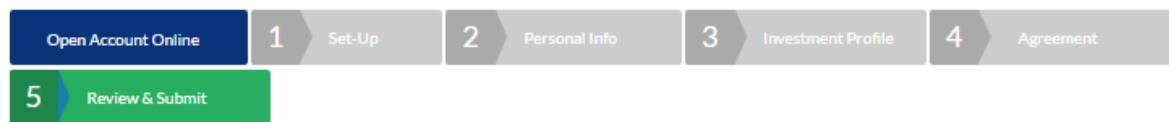
- Print your name:** A text input field containing "Taro Yamada". A blue arrow points to this field from a callout box labeled "102.氏名を英語で入力してください (例) Taro Yamada".
- Draw your signature:** A section containing a "Draw It" button, a signature canvas with the handwritten text "山田太郎", and a "Clear" button. A blue arrow points to the signature canvas from a callout box labeled "103.署名".
- Buttons:** At the bottom are two green buttons: "<< Back" and "Save And Continue >>". A blue arrow points to the "Save And Continue >>" button from a callout box labeled "104.「Save And Continue」をクリック".

102.Print your name(氏名): (名→姓の順で)「氏名」を入力してください

103.Draw your Signature(署名): マウスや指を利用して枠内に署名をしてください
削除したい場合は「Clear」をクリックしてください

104.「Save And Continue」をクリックしてください

申込手続きは完了です



Welcome to ChoiceTrade

申込確認番号

Congratulations! You have successfully opened an account at ChoiceTrade. There are just a few more steps and you can begin trading. Your application confirmation number is : **724590944414** (this is not your account number).

ChoiceTrade will review your account application and approve the account for funding. If you applied for margin and options trading capability, those applications will also be reviewed by ChoiceTrade. The account approval process usually occurs within a matter of hours – although if an account is opened at off-peak hours, such as 2am on a Sunday morning, the process will take a little bit longer.

Account Funding

Once your account is approved and you have an account number, you can immediately fund it. Please [Click Here](#) for funding instructions.

ATTENTION: Additional Forms May Be Required! Please follow the instructions below if you have not already submitted them.

In order to complete the processing of your account, we need you to complete or include the following form(s), if any, and return them to us by mail, fax or email. You may also upload the document directly to us with the form below. Please [convert all documents to PDF](#) before submitting with this form.

Mail or Fax Forms To:

ChoiceTrade
197 State Route 18
Suite: 3000
East Brunswick, NJ 08816
fax: (732) 514-6765 or
email: service@choicetrade.com

Government Identity Card

Please submit a copy of your government-issued photo ID such as a passport, national identity card or driver's license. Please do not send expired IDs as we will not be able to accept them. Important Note for Domestic (U.S.) customers: If you submit an ID that does not have your address or has an old address, or if the address on your application does not match the address on your ID, please also upload or email a utility bill as proof of current address.

Clearing Firm Test

Upload

Upload

Upload or Drag & Drop Files

こちらのページからは書類をアップロードできません

○申込確認番号

※確認メールが受け取れない場合の不備対応に備えて、申込確認番号をご記入ください

申込確認番号:

P3に記入した登録メールアドレスに、Choice Tradeからメールが届きます
メールが届いていることを確認してください

数日経ってもメールが届かない場合は、入力されたメールアドレスが正しく設定されていない可能性があります

105.登録したメールアドレスに2件のメールが、直ぐに届きます

メール①

Client:

Below are several important disclosures that you should print, read and retain for your records :

Options Disclosure <http://choicetrade.com/legal.php#disclosures>

Margin Disclosure <http://choicetrade.com/legal.php#disclosures>

Active Trading and Extended Market Risk Disclosure <http://choicetrade.com/legal.php#disclosures>

Special Statement for Uncovered Options Writers <http://www.choicetrade.com/forms/Options-UncoveredStmt.pdf>

THIS APPLIES ONLY TO OPTIONS CUSTOMERS: Please note that buying options is very risky. Option buyers generally lose money and many lose their entire investment within a short period. Please invest only as much as you can afford to lose entirely without your lifestyle being affected. Uncovered options, individually or as part of an option strategy, have special risks, and the potential for you to incur large losses, possibly greater than the value of your entire account. If you write covered calls, please pay special attention to risk #8 of the Uncovered Statement. SPECIAL NOTE REGARDING EXPIRING OPTIONS: Options that close "in the money" are automatically transacted at expiration. If your account holds one or more option positions that are either due to be automatically exercised or assigned at expiration, PLEASE NOTE THAT THE BUYING POWER FOR YOUR ACCOUNT MUST BE SUFFICIENT TO COVER THE FULL COST OF EITHER BUYING IN THE STOCK (IN THE CASE OF A LONG CALL OR SHORT PUT), OR DELIVERING OUT THE STOCK (IN THE CASE OF A SHORT CALL OR LONG PUT). Accounts that have insufficient buying power to cover such transactions must close out the option positions in question BEFORE EXPIRATION. In the case of long option positions, orders should be placed to sell such options even if the option is presently out of the money. ChoiceTrade may place a trade to liquidate option positions in your account. If such action is taken, there will be a \$50 sell-out surcharge assessed to each order that executes. Additionally, please note that your account may be temporarily locked to prevent cancellation of such orders. Your account will be unlocked.

(概要)

親愛なるクライアント

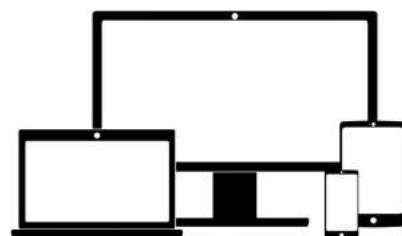
(重要なお案内)

- ・オプション取引についての開示は下記URLをご覧ください
- ・マージン取引についての開示は下記URLをご覧ください
- ・積極取引と拡大市場リスクの開示

オプション取引を希望された方にのみ適用します。

オプション取引はリスクをともあります。短期間に投資金を失う可能性もあります。

.....



メール②

investor,

Just a quick note to acknowledge that we received your application for a ChoiceTrade trading account. If you have not already either uploaded or emailed your government-issued picture ID to us, we ask that you please do so now.

U.S. customers are requested to please make sure that the address on their driver's license matches the address they noted on the application. If not, then please send us a recent utility bill that contains your name and current address, in addition to your ID.

Non-U.S. customers are requested to please send their passport copy with address that matches their address on the application. If your passport does not contain your address, please also send another document that does contain your address, like a driver's license, voting card or utility bill (but not a bank statement). (The documents will need to be in English please, otherwise a translation will be necessary before you send them to us).

The account approval process normally occurs within a matter of hours -- although if an application is submitted late in the day, it may take until the next business day. We will email you when your account is approved.


(概要)

投資家の皆様

申請書を受取りました。もし証明書類を添付頂いていない場合は、このメールに添付してメールしてください。

非米国のお客様は申請書に記入された住所と同一の住所が記載されたパスポートコピーをお送りください。もしパスポートに住所の記載が含まれていない場合は、住所が含まれている書類、公共料金の請求書、運転免許証、投票カード等を送ってください。(日本語書類と、英語翻訳がされた書類が両方必要です)

証券口座開設は数時間以内に行われますが、混雑状況により時間がかかる場合があります。証券口座開設手続きが終了しましたら、証券番号が割り当てられ、別途メールを送ります。



<証明書類を送っていない場合>

※※証明書類を準備し、「Choice Trade」から来たメールに添付して返信してください※※

【メール文面】

Dear Choice Trade Client Service

I send my document with this mail.

Please confirm it.

Thank you

<名前> ※アルファベットで入力

■ 申込完了後の流れ

メールの確認

メールサンプル(P39～)を確認いただき、
内容をご確認ください

Username/Passwordの発行

別紙「Choice Trade 証券口座開設後の
手続きについて」を参照し、発行された
UsernameとPasswordでログイン設定を
行ってください

取引準備完了

入金・トレードをインターネットにアクセ
スして自由に行うことができます

別途、Choice TradeおよびVision(ビジョン...トレード実行、
決済およびその他の関連サービスを実行します)より
証券口座開設についての書面が郵送されてきます
大事に保管ください

■ Choice Tradeからのメールについて

申込手続き完了後、書類が受理された場合や、書類不備や追加書類を提出する必要がある場合、後日Choice Tradeからメールが届きます
Choice Tradeから届くメールを確認し、案内に沿ってご対応ください



書類が受領された場合

Dear Client,
We have sent your application **for (final) review.**
Thank you
(送っていただきました申込書を(最終)審査します。)

または

Dear Client,
We have sent your document **for processing.**
Thank you
(送っていただきました書類を処理します。)



不備の場合は、不備内容がメール本文に記載されています
メールをそのまま放置せずに確認してください

<主な不備について>

- ①送ったパスポート画像が切れている
- ②公共料金等の請求書の翻訳を添付し忘れていた
- ③公共料金の請求書を添付し忘れていた
- ④追加書類を求められた
- ⑤銀行の残高証明書(※英文)のみ送っていた
- ⑥その他不備
- ⑦メールアドレスを間違えて登録してしまった
- ⑧メール2通(P36-37)は届いているが、その後Choice Tradeから連絡がない
- ⑨追加情報を求められた
- ⑩最終審査(Final review)のメールは届いたが、ユーザーネームとパスワードが発行されない
- ⑪登録したメールアドレスと違うメールアドレスでChoice Tradeに返信してしまった

※詳細は次ページから

メール本文中の項目をご確認いただき、返信例を参考にご対応ください
 が重要確認事項です

①送ったパスポート画像が切れている

Dear Client,

Please re-send your passport. **The copy you sent was cut off.**

In addition, please provide either a utility bill, cable bill, credit card bill, or mobile phone bill to verify your address.

Thank you.

(送っていただいたパスポートのコピーが切れているので再送してください。)

それに加えて、住所が確認できる公共料金、クレジットカード、携帯電話等、いずれかの請求書を提出してください。)

→パスポート等の証明書類を再度メールに添付し、Choice Tradeから届いたメールへ返信ください
 返信例はこちら↓



Dear Choice Trade Client Services

I attached my document with this mail.

Please kindly confirm it.

Thank you

Taro Yamada (※ご自身の名前)

(書類を添付します。ご確認ください。)

②公共料金等の請求書の翻訳を添付し忘れていた

Dear Client,

Please have this bill translated, and signed or stamped by a translator verifying the translation.

Thank you

(提出いただきました書類を翻訳してください。)

→公共料金等の請求書の翻訳をメールに添付し、Choice Tradeから届いたメールへ返信ください
 返信例はこちら↓



Dear Choice Trade Client Services

I attached my document with this mail.

Please kindly confirm it.

Thank you

Taro Yamada (※ご自身の名前)

(書類を添付します。ご確認ください。)

③公共料金の請求書を添付し忘れていた

Dear Client,
 If possible, **please provide a copy of a utility bill to verify your address.**
 If you do not have one, please let us know via email.
 Thank you
 (あなたの住所が確認できる公共料金の請求書コピーを送ってください。
 もしお持ちでない場合は、理由を返信メールにてお知らせください。)

→公共料金の請求書をメールに添付し、Choice Tradeから届いたメールへ返信ください
 返信例はこちら↓



Dear Choice Trade Client Services
 I attached my document with this mail.
 Please kindly confirm it.
 Thank you
 Taro Yamada(※ご自身の名前)

(書類を添付します。ご確認ください。)

※公共料金以外の請求書(例:携帯電話やクレジットカード等)を添付する場合
 返信例はこちら↓



Dear Choice Trade Client Services
 These charges are paid by the credit card and utility bills are sent by email, so no bills are delivered to my address.
 Thank you
 Taro Yamada(※ご自身の名前)

(公共料金の請求書はクレジットカードで自動引落しであり、メールで送られてくるため、自宅住所には届きません。)

④追加書類を求められた

Dear Client,
 Please **provide a copy of a *bank statement to verify your name and address.**
 Thank you
 (あなたの名前と住所が記載された英文の*(例)残高証明書のコピーを提出してください。)

→*指定された証明書類を添付し、Choice Tradeから届いたメールへ返信ください
 返信例はこちら↓



Dear Choice Trade Client Services
 I send you my *bank statement.
 Please kindly confirm it.
 Thank you
 Taro Yamada(※ご自身の名前)

(書類*(例)残高証明書を添付します。ご確認ください。)

⑤銀行の残高証明書(※英文)のみ送っていた

Dear Client,

Thank you for your account application.

Please provide a copy of your current utility bill to verify your residential address.

It must have your name and address, the same address you gave us on your account application.

Please do not send a bank statement. We would like only a utility bill, like a gas or electric or water bill.

ONLY if you do not have a utility bill, please explain in a return email why you do not have one, and then send us your bank statement or other proof of current address.

If your documents are not in English, they must be translated line by line, word for word, by a licensed translator and signed and stamped as a true translated copy by the official translator.

Thank you

(お申込みいただきありがとうございます。)

あなたの住所を確認する為、公共料金の請求書をご提出ください。英文の残高証明書は提出いただかなくて結構です。ガスや水道、電気料金等、公共料金の請求書を送ってください。もし、公共料金の請求書をお持ちでない場合は、その理由を返信メールへご入力いただき、住所が記載されている英文の残高証明書や他の証明書をお送りください。提出書類(公共料金の請求書)が英語でない場合は、正確に(フォーマット通りに)翻訳ください。)

→公共料金の請求書と翻訳をメールに添付し、Choice Tradeから届いたメールへ返信ください
返信例はこちら↓



Dear Choice Trade Client Services
I attached my document with this mail.
Please kindly confirm it.
Thank you
Taro Yamada (※ご自身の名前)

(書類を添付します。ご確認ください。)

⑥その他－１（職業について）

Dear Client,

Please clarify the nature of your business.

What type of *sales do you do?

Thank you

（あなたの職業を明確にして下さい。

あなたは何の*（例）セールスをしていますか？）

→申込手続き時に入力いただいた職業が具体的にない場合、詳細を問われることがあります
業種を追記し、Choice Tradeから届いたメールへ返信ください
返信例はこちら↓



Dear Choice Trade Client Services

I am doing a *○○○ sales.

Thank you

Taro Yamada (※ご自身の名前)

（私は*（例）○○○のセールスをしています。）

⑥その他－２（入力間違いについて）

Dear Client,

Please confirm your date of birth. The date you listed on your application does not match the date that your passport shows.

Thank you

（申込書に記入いただきました、あなたの誕生日がパスポートと同一ではありません。
ご確認ください。）

→入力フォームに誕生日を間違えて入力してしまった場合、Choice Tradeから届いたメールへ正しい情報を返信ください
返信例はこちら↓



Dear Choice Trade Client Services

Thank you for your mail.

My Date of birth is ○○(月)/ ○○(日)/ 19○○ same date as my passport.

Please update my information.

Thank you

Taro Yamada (※ご自身の名前)

（ご連絡ありがとうございます。）

私の誕生日はパスポートと同じ19○○年○月○日です。

更新をお願いします。）

⑦メールアドレスを間違えて登録してしまった (メール2通(P36-37)が登録したメールアドレスに届かない)

→Choice Trade(service@choicetrade.com)へ正しいメールアドレスをお送りください
送信例はこちら↓



Dear Choice Trade Client Services
I had opened my account whose was *(例)123456789012,
but this email address was incorrect.
Please correct it to ** (例)abc@gmail.com .
I apologize for the stupid mistake.

Best regards,
Taro Yamada (※ご自身の名前)

(私は証券口座 *(例:ご自身の申込確認番号をご入力ください。) の開設手続きをしましたが、登録したメールアドレスが間違っていました。
正しいメールアドレスは ** (例:ご自身のメールアドレスを正確にご入力ください。) です。訂正をお願いします。)

⑧メール2通(P36-37)は届いているが、Choice Tradeから何も連絡がない

→メール2通(P36-37)が届いてから **1週間** 何も連絡がない場合は、Choice Tradeへ進捗状況を確認してください
返信例はこちら↓



Dear Choice Trade Client Services
I had opened my account last week, but I haven't got a reply from you yet.
I'm worried that I couldn't get my application for review.

Could you check my situation?
If there is something I have to submit more information,
please let me know.

Thank you
Taro Yamada (※ご自身の名前)

(私は先週証券口座を開設しましたが、まだ貴社から何も連絡がありません。お手数おかけしますが、私の進捗状況を確認してください。もし、不備がありましたらご連絡ください。)

⑨追加情報を求められた

Dear Client,

As part of our account opening process. Please answer all of the following questions:

How did you hear about us? (チョイストレードをどこで知りましたか?)

What type of securities will you trade? (どの種類の証券を取引しますか?)

What is the typical size of your orders? (1取引あたりの株数はどのくらいですか?)

What will be the amount of your initial funding to your account?

(口座への最初の入金額はどれくらいですか?)

In which country are you physically located? (あなたはどこの国に在住していますか?)

Are you trading from your home, mobile device, office?

(あなたは自宅、携帯機器、仕事先から取引しますか?)

Are you going to be trading along side of others or by yourself?

(あなたは他人と一緒に取引をしますか、それともご自身で取引をしますか?)

Is anyone going to advise you what to buy or sell?

(誰かあなたに売買のアドバイスをする人がいますか?)

Will you be placing the orders yourself? (あなたは自分自身で注文をしますか?)

Any additional information you can provide would be appreciated so that we can better understand the type of trading to expect.

Thank you.

→Choice Tradeから追加情報を求められています

※ユーザーネーム・パスワード発行後に送られてくる場合もあります

Choice Tradeから届いたメールへ返信ください

返信例はこちら↓



Dear Choice Trade Client Services

How did you hear about us?

Friend.

What type of securities will you trade?

Stock.

What is the typical size of your orders?

100-500 averagely.

What will be the amount of your initial funding to your account?

About \$3,000.

In which country are you physically located?

Japan.

Are you trading from your home, mobile device, office?

Home or mobile device.

Are you going to be trading along side of others or by yourself?

By myself.

Is anyone going to advise you what to buy or sell?

No.

Will you be placing the orders yourself?

Yes.

Best regards,

Taro Yamada (※ご自身の名前)

⑩最終審査(Final review)のメールは届いたが、ユーザーネームとパスワードが発行されない

→Choice Tradeから届いたメールへ返信ください
返信例はこちら↓



Dear Choice Trade Client Services
I got a reply from you on *(例)Aug 10th, but I haven't got Username and Password yet.
Is there anything wrong for my final review?
Could you check my situation?
Thank you

Best regards,
Taro Yamada (※ご自身の名前)

(チョイストレードからの返信が*(例:8月10日)にありましたが、まだユーザーネームとパスワードが発行されません。
何か不備があるのでしょうか？状況を確認してください。)

⑪登録したメールアドレスと違うメールアドレスでChoice Tradeに返信してしまった

Dear Client,
This email is not linked to an application.
Thank you
(このメールアドレスは申込書と関連性がありません。)

→Choice Tradeから届いたメールへ返信する時は必ず開設手続き時に登録したメールアドレスで返信ください
返信例はこちら↓



Dear Choice Trade Client Services
Thank you for your reply.
I sent email to you from a different email address.

※※問合せ内容を続けてご入力ください※※

Best regards,
Taro Yamada (※ご自身の名前)

(違うメールアドレスで送ってしまいました。
※※問い合わせ内容※※)

— MEMO —

- 米国証券口座開設についてよくある質問を
下記URLにまとめさせていただきました。
ご確認ください。

<http://gaikokukabu.capital-consulting.info/>

- 米国証券口座開設についてのご質問は
メールにてお問合せください。

メールアドレス: ibc.shigeyoshi@gmail.com

IBC Consulting, LLC

※内容は予告なく更新する場合があります