

Sign Up with Folio Investing

SEMI Model Club

July 17, 2010

How do I allow Members access to our Folio Investing Account?

- Members must log into the Folio Investing Website

<http://www.folioinvesting.com>

- Sign up for a “Free” Basic account
- Furnish me their Folio Investing User Name and Date of Birth.
- I grant them Account Detail Viewer Access



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We've Done The Work For You.

Owning an investment portfolio that works for you doesn't have to be hard.

With over 100 pre-assembled portfolios that you can buy with a few clicks, you don't need to build a portfolio one stock at a time.



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The 5 Keys to Successful Investing: [Diversify](#) [Reduce Costs](#) [Personalize](#) [Invest Consistently](#) [Minimize Taxes](#)

Try Us Free. No Obligation

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Start Investing Wisely



Define your investment needs with our [questionnaire](#)

It's easy!

Folio Unlimited Plan



Learn more about [commission-free investing](#)

A New Approach to Investing



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"It's a way that you can invest at very low cost, and have a great deal of control over what your investments are doing."

Ready-to-Go Folios — Designed for your needs



[Low Volatility](#) and [Defensive Strategy](#) Folios for investing in turbulent times or [Target Date](#)

Folio Institutional: For Investment Professionals



A fully-integrated solution for investment managers, advisors, broker-dealers and more

Folio Investing in the News

"...[Folio Investing] aims to make it easy to create and manage portfolios of multiple securities. While the original focus was on individual stocks, the approach is an excellent fit for ETFs."

Open an Account: Folio Investing - Windows Internet Explorer

https://www.folioinvesting.com/open.jsp

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Open An Account

Get started investing with Folios in 4 easy steps.

- 1 Choose an Account Type**
Choose from a number of personal, joint, or corporate accounts and more.
- 2 Enter Account Information**
Enter specific details, such as Social Security number or Tax ID, date of birth, etc.
- 3 Select Pricing**
Select the Folio Unlimited Plan or the Basic Plan.
- 4 Fund Your Account**
Deposit money by check, wire, or electronic funds transfer.

60 Days Free Details

- Only with the Folio Unlimited Plan
- Commission-Free window trading
- We wait until 60 days after you deposit money before we bill your monthly/annual plan fee
- Charges apply for other services

Included Account Features

- Over 100 [Ready-to-Go Folios](#)
- [Analyst Ratings and Market Research](#) from Quotemedia.com
- As many [account types](#) as you need (IRAs, Joint, etc.)
- [Watch Accounts](#) to test your strategies without real money

And more [Brokerage Features](#)

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https://www.folioinvesting.com/servlets/ProcessAction?identifier=createMemberAccountTypes&click1=Accounts_Open

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Open an Account: Become a Folio Investing Member!

To open a new account and become a Folio Investing member, select an account below and click "Continue." A Social Security number and individual tax identification number will be required. [Learn More.](#)

Personal Accounts

- ☒ Individual
- ☐ Joint - Rights of Survivorship
- ☐ Joint - Tenants in Common
- ☐ Joint - Community Property
- ☐ Joint - Tenants by Entirety
- ☐ Custodial (UGMA/UTMA)
- ☐ Revocable Trust

Retirement Accounts


- ☐ SEP IRA
- ☐ IRA Rollover
- ☐ Traditional IRA
- ☐ Roth IRA

Business Accounts



- ☐ Corporation
- ☐ General Partnership
- ☐ Limited Partnership
- ☐ Limited Liability Company
- ☐ Sole Proprietorship

Other Accounts

- ☐ Investment Club
- ☐ Business Trust
- ☐ Unincorporated Organization

Secured by  2010-07-13

Continue

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How can we help

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https://www.folioinvesting.com/servlets/ProcessAction?identifier=makeAccount

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Accounts Overview My Profile Market Data Help

Become a Member: Account Information

Please enter your account information.

Title: []

First Name, Middle Initial: []

Last Name, Suffix: []

Email Address: [] [A valid email address is required.](#)

Date of Birth: (mm/dd/yyyy) []

Home Address (Street addresses only; please, no P.O. Boxes)

Address 1: [] [Missing Address?](#)

Address 2: []

Address 3: []

City, State: []

Zip Code: []

Country: United States

Contact Information

Day Phone Number: []

Evening Phone Number: []

User Name and Password

Create your FOLIOfn User Name and Password:

User Name: [] Choose carefully; you cannot change your user name. (Use at least 8 characters, not case sensitive)

Password: [] (Use at least 6 characters, not case sensitive)

Confirm Password: []

Keep a record of your user name and password in a safe place. You'll need both to log in.

Secret Question and Answer

Secret Question: []

Secret Answer: []

LOOK FOR MORE INFORMATION ON THIS SUBJECT IN THE MARGINS.

How did you hear about us?

Other: []

Promotion Code (Optional)

If you have a promotion code, please enter it here: []

[Membership Agreement](#)

By clicking "Continue" you agree to our [Membership Agreement](#) which requires that you give us accurate personal information.

[Continue](#)

Explain This Page

Required Info
All info is required except title, middle initial, and suffix.

Your info is safe.
All information is encrypted for your protection.

Email is required.
When you open an account you agree to receive all documents electronically.

Opt out of promotions.
Click to [opt out](#) of promotional offers.

How does Secret Question work?
If you forget your password, we'll ask you this question. Make sure only you know the answer. You won't need to remember the question, but you will need to memorize your answer exactly as you typed it in.

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Folio Investing®
5100 Greenboro Drive, 8th Floor
McLean, VA 22102
Toll Free: 1-888-975-7890
[Email Us](#)

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Page Safety Tools

Become a Member: Account Information

Please enter your account information.

Title: Ms.

First Name, Middle Initial: Suzy Q

Last Name, Suffix: Investor --

Email Address: suzyq@yahoo.com [A valid email address is required.](#)

Date of Birth: 01 / 02 / 1957 (mm/dd/yyyy)

Home Address (Street addresses only; please, no P.O. Boxes)

Address 1: 1234 Anywhere Lane [Military Address?](#)

Address 2:

Address 3:

City, State: Noplace MI

Zip Code: 48888 -

Country: United States

Contact Information

Day Phone Number: 313-456-7890

Evening Phone Number: 248-456-7890

Explain This Page

Required Info
All info is required except title, middle initial, and suffix.

Your info is safe.
All information is encrypted for your protection.

Email is required
When you open an account you agree to receive all documents electronically.

Opt out of promotions
Click to [opt out](#) of promotional offers.

How does Secret Question work?
If you forget your password, we'll ask you this question. Make

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https://www.folioinvesting.com/servlets/ProcessAction?identifier=makeAccount

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Page Safety Tools

User Name: Choose carefully, you cannot change your user name.
(use at least 8 characters, not case sensitive)

Password: (use at least 6 characters, not case sensitive)


Confirm Password:

 Keep a record of your user name and password in a safe place.
You'll need both to log in.

Secret Question and Answer

Secret Question:

Secret Answer:

 LOOK FOR MORE INFORMATION
ON THIS SUBJECT IN THE MARGINS.

How did you hear about us?

Promotion Code (Optional)



If you have a promotion code, please enter it here:

By clicking "Continue," you agree to our [Membership Agreement](#).
Our Membership Agreement requires that you give us accurate personal information.

[Continue](#) ➔

Make sure only you know the answer. You won't need to remember the question, but you will need to memorize your answer exactly as you typed it in.

[More Information](#)

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Finishing Up

- Furnish the rest of the requested information to Folio Investing
- Furnish me your Folio Investing User Name and Date of birth
- I will grant you Detail Viewer Access to the SEMI Model Club on Folio Investing

Account Detail Viewer

Account Detail Viewers can:

- View account order status
- View tax information
- View Folio transaction history
- View Folio holdings
- View Folio order status
- View Folio tax information
- Do anything that can be done by Account Summary Viewers

The Account Detail Viewer cannot conduct any activity on the account.

Examples: *An investment club might grant its members Account Detail Viewer access.*

Folio Investing: Log Into Your Account - Windows Internet Explorer

https://www.folioinvesting.com/servlets/ProcessAction?identifier=loginFormEntry&click1=Login

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Log Into Your Account

Username
Idougla2 [Forgot username?](#)

Password
..... [Forgot password?](#)

☐ Remember my Username

[Log In](#)

By logging in, you agree to any changes in your [membership](#) and [customer](#) agreements, including recent changes to the [IRA](#) and [Roth IRA](#) agreements.

New Address for Depositing Checks

Please update the mailing addresses you use to send us checks and other deposits. Effective immediately, please mail deposits to:

For IRA Accounts	For All Other Accounts
Folio Investing PO Box 10265 McLean, VA 22102-8265	Folio Investing PO Box 10246 McLean, VA 22102-3888

Mail or deposits sent to our old PO Box addresses after July 31, 2010 may be significantly delayed. Please remember to update the addresses with any online billpay providers you use as well.

Defensive Investing in Volatile Markets

The wild market swings we've all been seeing lately have caused many investors to look for less volatile investments. Take a look at the press release below, where we discuss two of our [Ready-to-Go](#) portfolio models designed to provide relief during volatile markets: the [Defensive Strategy Folio](#) and the [Low Volatility Folio](#).

[Folio Investing's Defensive Portfolios Succeed in Wild May Market, Maintain Equities' Upside](#)
Good Results in May's Rocky Market Affirm That Risk Can be Managed.

Customer Service Online Chat is Here!

There's a convenient new way to reach Folio Investing when you need us. Customer Service Online Chat is now available Monday through Friday during most business hours from the Folio Investing website.

Chat with a member of our support team by clicking on the green Chat Now icon at the top right corner of all our web pages. You can also use the Online Chat button on the [Contact Us](#) page.

