

Profile Investment Services, Ltd.

TOOLKIT

for

Opening U.S. Brokerage Accounts from Overseas



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Table of Contents

Important Articles for American Citizens Living Abroad	1
Blog Articles	2
Videos	3
Checklist	4
Audio Articles	5
Especially for American Expats	6
General Financial Planning Tools	7
For More Information	8

Important Articles for American Citizens Living Abroad

These specific pages on the Profile Investment Services website contain crucial information relating to opening a U.S. brokerage account from overseas.

6 Reasons Why You Should Have a U.S. Brokerage Account

VIEW

Who Needs a U.S. Brokerage Account /10 Steps to Opening a U.S. Brokerage Account

VIEW

Problems Dual Citizens, Expats, and *Olim* May Face Vis-à-Vis Uncle Sam

VIEW

Solutions to Issues Affecting Inherited IRAs and Beneficiaries Who Live Overseas

VIEW

Blog Articles

Should You Invest Through Your Israeli Bank?

VIEW

What to Do If You Can't Buy U.S. or Israeli Mutual Funds

VIEW

Why You Can't Buy a U.S. Mutual Fund

VIEW

Did You Get a Letter Saying You Can No Longer Buy U.S. Mutual Funds?

VIEW

Problems With Your U.S. Brokerage Account?

VIEW

What Every U.S. Citizen Living in Israel Should Know

VIEW

How Punitive U.S. Financial Regulations Can Hurt You

VIEW

Should Your Money Make *Aliya*?

VIEW

A Quick Solution for Non-Americans Investing in the U.S.

VIEW

How to Make the Most of a Strong U.S. Dollar

VIEW

Is Currency Diversification Important?

VIEW

Do You Know About These Hidden Dangers in Currencies?

VIEW

Videos



10 Steps to Opening a U.S. Brokerage Account
(14:30 minutes)



U.S. Investment Accounts for People in Israel
(4:00 minutes)



U.S. Brokerage Accounts for non U.S. Residents
(10:00 minutes)



Papers You Sign When Opening a U.S. Brokerage Account
(6:50 minutes)

Checklist



VIEW

**Interactive Form to Determine Eligibility for
Opening a U.S. Brokerage Account from Israel**

Audio Articles

How to Solve this common Problem with American Brokerage Accounts
(03:10) [PLAY NOW](#)

The Surprising Results of an Investment Evaluation Tool
(03:20) [PLAY NOW](#)

Why You Might Benefit from Having a U.S. Brokerage Account
(03:30) [PLAY NOW](#)

Avoid Making this Mistake with an Inherited IRA
(03:30) [PLAY NOW](#)



Especially for American Expats

Find out what your tax obligations are to the U.S. government and how to manage them from overseas.



THE EXPAT'S GUIDE

CLICK HERE

General Financial Planning Tools

3 Steps to Picking a Financial Advisor

VIEW

Investment Evaluation Tool

VIEW

Create a Financial Snapshot

VIEW

For More Information

Profile Investment Services, Ltd. can help you open a U.S. brokerage account from abroad.

Brokerage accounts can hold mutual funds, stocks, bonds, bank deposits, etc.

All trades are done through our U.S. broker-dealer, Portfolio Resources Group, Inc. As a PRG client, you have access to a variety of investments and services, such as:

- **Checking account and Visa debit card**
- **Stocks, bonds, mutual funds, and ETFs**
- **FDIC-insured bank deposits (CDs)**
- **Global portfolios**
- **Money managers and wealth management**

We can help you open the following types of accounts:

- **Individual**
- **Joint Tenant**
- **Trust**
- **Estate**
- **Custodian for Minor**
- **Corporation**
- **Retirement accounts**
- **Traditional IRA**
- **Participant IRA**
- **Rollover IRA**
- **ROTH IRA**
- **Inherited/beneficiary/deceased IRA**
- **Sole Proprietorship**

Securities offered through Portfolio Resources Group, Inc., Member of FINRA, SIPC, MSRB, FSI. Accounts carried by Pershing LLC., Member NYSE/SIPC, a subsidiary of The Bank of New York Mellon Corporation.

To find out more how Profile Investment Services, Ltd. can help you open a U.S. brokerage account from overseas call 02-624-2788, toll-free from U.S. 1-888-327-6179, or email: info@profile-financial.com