

Funding your Trade Direct Account

- **Initial Account Funding** –For new accounts, submit your Account Application with your check. Please be sure to review our list of [Acceptable Deposits](#).

Check Deposit: Please make Check Payable to *LPL Financial* (note ‘New Account’ on your check) Mail with your Account Application to:

LPL Financial
Attn: Trade Direct
PO Box: 6575
Fort Mill, SC 29715

- **Existing Account Funding**– For existing customers who have an LPL Account Number. Please be sure to review our list of [Acceptable Deposits](#).

- **Check Deposit**-- (note your LPL Trade Direct ‘Account Number’ on the check) and Mail to:

LPL Financial
Attn: Trade Direct
PO Box: 6575
Fort Mill, SC 29715

Retirement Accounts: Submit a [Contribution Instructions \(Check/Security Deposit\)](#) form with your deposit)

- **Wires:** Transmit US dollars from domestic financial institutions to:

The Bank of New York
ABA Routing Number: 021000018
Account Name: *LPL Financial Corp. Wire Receipt*
Credit Account Number: 8900511524
For Further Credit: Your LPL Trade Direct Account Number

- **ACH:** Transmit US dollars from domestic financial institutions to:

The Bank of New York
ABA Routing Number: 021000018
Account Name: *LPL Account Name*
Credit Account Number: *146000000 followed immediately by the 8-digit LPL client account number (i.e. 146000000xxxxxxx)*

- **Transfers:** Once your account is opened and you have received an account number you may transfer assets from another firm or from another LPL account:

- **To Transfer From another firm To your LPL Trade Direct Account:** Complete and submit the [Transfer Instruction to LPL \(External\)](#) Form
- **To Transfer From an existing LPL account to your LPL Trade Direct Account:** Complete and submit the [Transfer Instructions \(Internal\)](#) Form -for NON Retirement Accounts

OR

[Contribution Instructions -Transfer Request Form](#) for Retirement Accounts.