



## The Easy Way to Open a U.S. Brokerage Account When You Move to Israel

Lots of Americans in Israel call me when they find out their current brokerage firm will no longer maintain their investment or retirement accounts. I explain that the reason our company is allowed to open U.S. accounts for clients in Israel is because we have American securities licenses, and we also have an office in Israel, so we can fulfill the “know your client” regulations with our clients in Israel. Here are the important things you know if you want a simple way to maintain or open U.S. brokerage accounts when you live in Israel.

1. Ask the company that you’re considering if they have cross-border clients like you, and if their compliance officers will allow them to open a U.S. account for you.
2. Make sure you have proper identification like a passport. Your name on your passport should be the same as the name you have associated with your Social Security number. And make sure your passport is up-to-date.
3. Confirm you can get a checkbook and debit card, if that’s important to you, and that you’ll have online access to view your account (since mail in Israel is sometimes very slow).
4. Determine if the company can buy investments for you that you want (not just that they want to market to you). For example, if you want access to stocks, bonds, mutual funds, ETFs, and bank deposits, can they do that for you easily?
5. If you need advice on overall financial planning, make sure your advisor is, in fact, a financial planner and not just a bank representative who will sell your investment products.
6. Read the complete article about how to open a U.S. brokerage account from Israel: [www.profile-financial.com/How-to-open-a-US-brokerage-account](http://www.profile-financial.com/How-to-open-a-US-brokerage-account)

Wherever you are on the path to retirement, *The Goldstein on Gelt Show* helps you manage your money better. Download our latest episode to

- understand the basics of personal finance (budget better, save more, avoid debt),
- learn investment strategies from the world’s best investors,
- improve your retirement plan, and
- build healthy financial habits.



Every show includes a discussion with an expert on how to invest for success. Host Douglas Goldstein, CFP® uses his 25 years of experience as a financial advisor to make money concepts simple to understand. Practical lessons give you tools and tips so you can make real changes. Contact Doug at [Doug@Profile-Financial.com](mailto:Doug@Profile-Financial.com) or call +972-2-624-2788.

Due to the unpredictable nature of the investment markets, the ever-changing economic scene, and the inherent risk that an investor may lose money, there is no guarantee or assurance whatsoever that any of the ideas or strategies discussed here will be successful. We are not responsible for any loss, liability, or risk incurred as a result of applying or using any of the information on this show. Please read the complete disclaimer [here](#).

**[www.GoldsteinOnGelt.com](http://www.GoldsteinOnGelt.com)**

Date of show: 07/12/2018