

Account Transfer Reimbursement

Transfer Your Account to Webull and **Get Up to \$175**



Transfer Today

Terms and Conditions apply.

Get Your \$100 Reimbursement

ACAT Only

Receive \$100 with your first transfer of \$2,000 or more into your cash or margin account.

Reimbursement applies only to the first completed transfer.

Transfer Today

Get Your \$75 Reimbursement

ACAT Only

Receive \$75 with your first transfer of \$5,000 or more into a self-directed Traditional, Rollover, or Rollover IRA at Webull.

Reimbursement applies only to the first completed transfer.

Transfer Today

Note: Joint accounts, futures accounts, and managed IRAs are excluded from this promotion.

Limit one Brokerage Account Transfer Fee Reimbursement and one IRA Account Transfer Fee Reimbursement per person.

Webull Financial LLC (member SIPC, FINRA) offers self-directed securities trading. All investments involve risk. Index Option Contract Fees, Regulatory Fees, Exchange Fees and other

Webull is not a bank. Rates subject to change. More info: <https://www.webull.com/disclosures>

Why Invest with Webull?



Accounts That Fit Your Goals

Choose from Cash, Margin, Traditional, Roth, or Rollover IRA accounts.



Advanced Charting Tools

Access pattern recognition tools with detailed drawings, indicators, and technical signals.



Overnight Trading

Anytime is Prime Time for Your Portfolio with 24/5 Overnight Trading from Webull.



Earn 3.35% APY on Uninvested Cash

Keep your uninvested cash working for you with Webull Premium's 3.35% APY.*

*Webull Financial LLC, Member SIPC, FINRA. Investing involves risk. Subscription required. Fees may apply. More info at webull.com/disclosures

FAQ

How many times can I receive the transfer fee reimbursement?

You may be eligible for up to two transfer fee reimbursements, totaling \$175.

You may receive \$100 when you transfer a brokerage account (cash or margin) to Webull for the first time, with a transfer amount of \$2,000 or more. Please note that if you transfer both a margin account and a cash account separately, you will receive the reimbursement only once, based on the first completed transfer.

You may also receive \$75 when you transfer an IRA account to Webull for the first time, with a transfer amount of \$5,000 or more. If you transfer assets from another Traditional IRA, Roth IRA, or roll over a 401(k) to a Webull IRA, you will receive the reimbursement once, based on the first completed IRA transfer.

What counts as a qualifying transfer, and how does it work?

A qualifying transfer occurs when you move eligible assets from an external brokerage account to Webull using the Automated Customer Account Transfer Service (ACATS). You can choose to complete either a full or partial transfer:

Full Account Transfer: Moves all assets from your external brokerage account to Webull.

Partial Account Transfer: Allows you to select specific assets to transfer to Webull.

Please note that only one transfer request can be processed at a time. If multiple transfer requests are submitted while one is in progress, the additional requests will be rejected. Be sure to wait until your current transfer is complete before initiating a new

What securities can I transfer to my Webull account?

Only US exchange-listed stocks, American Depositary Receipts (ADRs), ETFs, treasury bonds, and options can be transferred. Please note that these assets must be tradeable on Webull to be eligible for transfer. OTC securities and mutual funds are not transferable and any fractional shares in your account will be liquidated when you initiate an account transfer. To ensure a smooth transfer, review the following requirements:

Currency: Webull only accepts assets in USD; non-USD assets cannot be transferred.

Minimum Value: Transferred assets must have a minimum value of \$500.

Options Expiry: Options contracts must not expire within the next two weeks to be eligible for transfer. Additionally, your Webull options level must be sufficient to support the position once transferred.

Bond Maturity: Any treasury bond being transferred must have a maturity date that is more than 10 days away.

How long does it take to transfer an account?

Transferring cash or securities from other brokers to Webull typically takes 5–7 business days. However, the transfer may be delayed if the brokerage account type being transferred does not match.






New transactions are made in the delivering brokerage account after the transfer is initiated.

To avoid delays, ensure that your account details are accurate and refrain from making new transactions in your external brokerage account once the transfer process has begun.

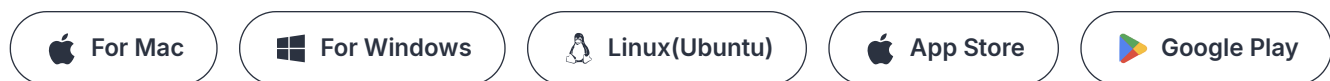
How is the transfer value calculated?

For the purpose of calculating the amount of a transfer, regardless of whether it is a transfer in or a transfer out, the value of a transferred securities will be determined by reference to the National Market System closing price of such securities at the close of trading on the day before the settlement of the transfer.

[Transfer Today](#)

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Securities trading is offered to self-directed customers by Webull Financial LLC, a broker dealer registered with the Securities and Exchange Commission (SEC). Webull Financial LLC is a member of the Financial Industry Regulatory Authority ([FINRA](#)), Securities Investor Protection Corporation ([SIPC](#)), The New York Stock Exchange ([NYSE](#)), [NASDAQ](#) and Cboe EDGX Exchange, Inc ([CBOE EDGX](#)).

Futures and cleared swaps trading is offered by Webull Futures LLC, a CFTC registered Futures Commission Merchant with the Commodity Futures Trading Commission (CFTC) and a Member of the National Futures Association([NFA](#)). Futures and cleared swaps trading involves substantial risk and is not suitable for all investors. Please read the Risk Disclosure Statement and other relevant Futures Disclosures located at www.webull.com/fcm-disclosures prior to trading futures or cleared swaps products. Futures accounts are not protected by the Securities Investor Protection Corporation (SIPC).

Advisory accounts and services are provided by Webull Advisors LLC (also known as "Webull Advisors"). Webull Advisors is an Investment Advisor registered with and regulated by the SEC under the Investment Advisors Act of 1940. Registration does not imply a level of skill or training. See additional information on the Disclosures webpage. Trades in your Webull Advisors account are executed by Webull Financial LLC.

Account Protection: SIPC and Excess SIPC Coverage Client securities accounts at Webull Financial LLC are protected by the Securities Investor Protection Corporation ("SIPC") for a maximum coverage of \$500,000 (with a cash sublimit of \$250,000). In addition, Webull offers clients Excess SIPC coverage based on the clearing arrangement: For securities accounts under the omnibus clearing relationship with Apex, Webull carries an excess SIPC policy with certain underwriters at Lloyd's of London, which extends per account coverage for securities and cash up to an aggregate of \$100 million, subject to a maximum limit of \$1,900,000 for any one customer's cash. Securities positions are not subject to any per account sublimit. (ii) For securities accounts that are fully-disclosed to the clearing firm, Apex has purchased an additional insurance policy. The coverage limits provide protection for securities and cash up to an aggregate of \$150 million, subject to maximum limits of \$37.5 million for any one customer's securities and \$900,000 for any one customer's cash. For the purpose of determining a Webull Financial LLC covered account, accounts with like names and titles are combined, but accounts with different titles are not (e.g. Individual/John Doe and IRA/John Doe). Futures and other assets held outside the securities account are not covered. SIPC and Excess SIPC Protections do not protect against a loss in the market value of securities. SIPC is a non-profit, membership corporation funded by broker-dealers that are members of SIPC. For more information about SIPC and answers to frequently asked questions please refer to the following websites: (i) <http://www.SIPC.org> (ii) <https://www.investor.gov/introduction-investing/general-resources/news-alerts/alerts-bulletins/investor-bulletins/investor-bulletin-sipc-protection-part-1-sipc-basics>

Options trading entails significant risk and is not appropriate for all investors. Option investors can rapidly lose the value of their investment in a short period of time and incur permanent loss by expiration date. Losses can potentially exceed the initial required deposit. You need to complete an options trading application and get approval on eligible accounts. Please read the [Characteristics and Risks of Standardized Options](#) before trading options.

All investments involve risk, and not all risks are suitable for every investor. The value of securities may fluctuate and as a result, clients may lose more than their original investment. The past performance of a security, or financial product does not guarantee future results or returns. Keep in mind that while diversification may help spread risk, it does not assure a profit or protect against loss in a down market. There is always the potential of losing money when you invest in securities or other financial products. Investors should consider their investment objectives and risks carefully before investing.

Diversification does not eliminate the risk of experiencing investment losses. Margin trading increases risk of loss and includes the possibility of a forced sale if account equity drops below required levels. Margin is not available in all account types. Margin trading privileges are subject to Webull Financial, LLC review and approval. Leverage carries a high level of risk and is not suitable for all investors. Greater leverage creates greater losses in the event of adverse market movements.

Investors should be aware that system response, execution price, speed, liquidity, market data, and account access times are affected by many factors, including market volatility, size and type of order, market conditions, system performance, and other factors. Market volatility, volume and system availability may delay account access and trade executions.

Free trading of stocks, ETFs, and options refers to \$0 commissions for Webull Financial LLC self-directed individual cash or margin brokerage accounts and IRAs that trade U.S. listed securities via mobile devices, desktop or website products. A \$0.50 per contract fee applies for certain index options and a \$0.10 per contract fee applies for oversized option orders. Relevant regulatory and exchange fees may apply. Please refer to our [Fee Schedule](#) for more details.

No content on the Webull Financial LLC website shall be considered as a recommendation or solicitation for the purchase or sale of securities, options, or other investment products. All information and data on the website is for reference only and no historical data shall be considered as the basis for judging future trends.

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