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CITI® SELF INVEST

# Earn Up to \$500

when you fund a Citi Self Invest account and complete all requirements. [See details](#)

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## Preparing for retirement?

Roth and Traditional IRAs are also available if you have an eligible Citi checking or savings account.

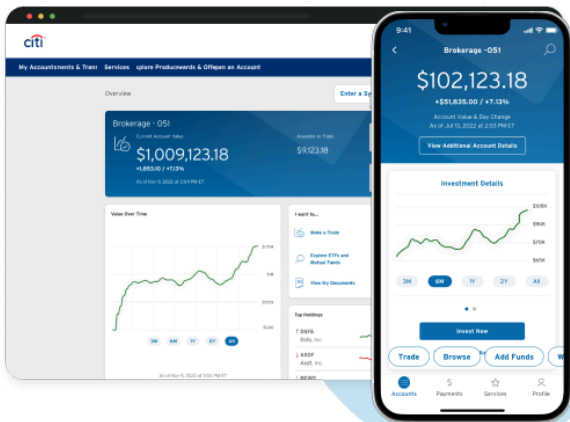


## Citi® Self Invest

Take control of your investments with Citi Self Invest, a self-directed, commission-free<sup>1</sup> online trading account that lets you manage your portfolio with more convenience.

Citi Self Invest also offers Roth and Traditional IRAs so you can save for the future.

**\$0** Online trading commissions  
No minimum is required to open an account.



### No Account Minimums

Simply fund your self-directed investment account, and you're ready to trade.



### More Banking Benefits

Investments count towards your overall Citi account balances to unlock additional [banking benefits](https://online.citi.com/US/ag/banking/banking-overview) (<https://online.citi.com/US/ag/banking/banking-overview>).



### Invest Anywhere

Trade at home on your desktop or on the go with our mobile app.



### Always-on Service

Enjoy support from a dedicated Citi team.

Already a Citi customer? [Sign On](#)

New to Citi Self Invest

## Take Control of Your Retirement

It's easier than ever to start saving for retirement with a Traditional or Roth IRA account from Citi Self Invest. Enjoy the tax advantages of a retirement account with commission-free online trading.

Open an account online to start planning your future on your terms.

[Open an Account](#)



## Features for Every Self-Directed Investor

Citi Self Invest provides the tools for a better investing experience.

### Invest Your Way

Trade thousands of different stocks, mutual funds, and ETFs with no online trading commissions and no account minimum (1) and the capability to invest with margin. (2)

### Financial Education

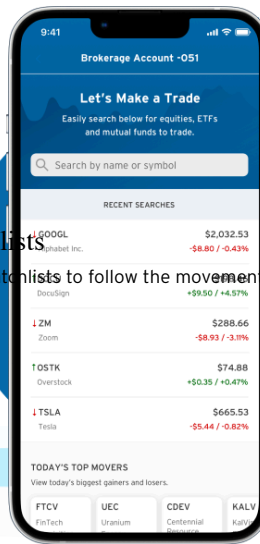
Learn more about investing basics with a collection of educational content.

## Latest Market News

Keep up to date with the latest financial news and commentary.

## Custom Watchlists

Create your own watchlists to follow the movement of the securities you're interested in.



For illustrative purposes only.

## Get Started

Open a Citi Self Invest account today and get ready for commission-free trading.

[Open an Account](#)



## Citi Self Invest FAQs

We have the answers for all your Citi Self Invest questions.

[Expand All](#)

✓ [What is Citi Self Invest?](#)

✓ [How do I open a self-directed brokerage account?](#)

[Feedback](#)

✓ How can I fund my Citi Self Invest account?

✓ How long will it take to transfer funds?

✓ Can I transfer an account from another broker?

✓ Do I get a Financial Advisor with my self-directed investing account?

## Looking for other ways to invest?

We offer other ways to invest and can help you choose one that best meets your investment needs.



### Citi® Wealth Builder

Citi Personal Wealth Management's low-cost robo-advisor investing platform with professionally created portfolios helps keep you on track to meet your goals

[Learn More](#)



### Citi® Personal Wealth Management

Work with a dedicated Citi Personal Wealth Management Financial Advisor who can provide professional planning and investment guidance.

[Learn More](#)

Questions? We can help. Reach us at [\(877\)693-4543 \(tel: Number\(8776934543\)\)](tel:8776934543).  
TTY: 711



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We are required to deliver two important disclosure documents about our business and relationship with you:

- **Form Client Relationship Summary (“Form CRS”)** is a brief summary of the brokerage and advisory service we offer.
- **Regulation Best Interest Disclosure Statement and Related Information for Retirement Accounts** is a more detailed description of the brokerage services we offer and our obligations under Regulation Best Interest when we make recommendations to you as your broker-dealer.

Please review both of these important documents online at <https://www.citi.com/investorinfo/> (<https://www.citi.com/investorinfo/>). If you prefer paper copies, please contact your advisor or call us at (800) 846-5200. For TTY: We accept 711 or other Relay Service.

<sup>1</sup>Commission-free online trading applies to stocks, ETFs and mutual funds. There are costs associated with ETF and mutual fund investing, such as management fees. Trading of ETFs in Citi Self Invest online and on the Citi Mobile® App excludes leveraged and inverse ETFs. Other fees and restrictions may apply for fixed income liquidations. You can learn more about the CPWM fee schedule at <http://www.citi.com/investorinfo/> (<http://www.citi.com/investorinfo/>)

<sup>2</sup>Borrowing against securities may not be suitable for everyone. Margin loans can carry certain risks and can magnify losses. Pershing LLC, member FINRA, NYSE, SIPC, carries the accounts and is the securities-based lender of margin pursuant to a clearing agreement with CGMI.

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# Citi® Self Invest

Commission-free online trading

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