

**O'NEIL & STEINER, PLLC**  
**TRUMP ACCOUNTS ORGANIZER**

1. Who will sign the form under penalty of perjury to authorize the opening of the account once it has been completed? The first name of authorized individual is all we need. We will already have the rest of the information for you. If multiple people qualify, see #2a above for a priority ranking of who is the authorized individual. If multiple people in the same category qualify (parents, etc.) we suggest you choose the one that is best able to come to the office to sign it upon completion of your returns:

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2. Beneficiary child information: If the child, or children if you would like to open Trump accounts for more than one, is going to be claimed as a dependent on your return all we will need is their first name.

a. First name of child beneficiary #1: \_\_\_\_\_

b. First name of child beneficiary #2: \_\_\_\_\_

c. First name of child beneficiary #3: \_\_\_\_\_

d. First name of child beneficiary #4: \_\_\_\_\_

e. First name of child beneficiary #5: \_\_\_\_\_

3. Do you wish to make the additional election to request the Treasury Department to make the \$1,000 Pilot Program Contribution all children listed above who were born in 2025-2028?

Circle one:

Yes or No or N/A

**\*\*If you circled “Yes” or “N/A” stop here\*\***

\*Only if you DO NOT want the \$1,000 Pilot Program Contribution

Above: Please confirm you wish only to open the Trump accounts (to not elect the Pilot Program Contribution) for all eligible children by initialing here: \_\_\_\_\_

4. If you wish to elect to have some of the qualifying beneficiaries receive \$1,000 Pilot Program Contributions and others not to receive them, please provide detailed instructions below.

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