

在线开户申请首页

## Welcome to TransAct Account Opening Process

5%

点此开设新账户

Start NEW Account Application

Open your account with TransAct Futures quickly, easily and securely using our encrypted online application.

点此重新登录未完成的开户申请，检查申请状态或者修改申请资料

I have a UserName/Password

- Login to resume and submit an existing application.
- Login to check the status of your application.
- Login to respond to a review and update application.

## New Application - Choose Account Type 选择账户类型

15%



Yes, I would like to open my account online. \* 请勾选此项，表示希望在线申请开户。

Referring Broker:

Juliet Wu



在此输入你的账户经理的名字

INDIVIDUAL

选择要开设的账户类型，  
INDIVIDUAL个人账户，

JOINT

JOINT联名账户。

**NOTICE TO CUSTOMERS** We will provide notice to customers that the firm is requesting information from them to verify their identities, as required by Federal law. We will include the following statement on our account applications to provide notice to customers:

**\* Important information about procedures for opening a new account**

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account.

What this means to you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents

## Confirm Account type Selection: **INDIVIDUAL**

Your data will be collected and application will be processed based on account type.  
Please confirm your account type selection to proceed.

点此按钮确认账户类型。



Confirm

Reselect



10%

Create a online account with TransAct - choose and set your username/password with 3 security questions.  
This will be your credentials for this application process and for all TransAct systems.

Create Login Credentials:

创建用户名和密码（用户名和密码将被用于开户申请以及登录真实账户使用）

Desired User Name\*:

apptest1

创建用户名：

Desired Password\*:

••••••

创建密码：

Password must contain: Minimum 6 characters with at least 1 UpperCase Alphabet, 1 LowerCase Alphabet and No Special Characters (!!\*)

Confirm Password\*:

••••••|

确认密码：

Trading Information: 交易信息

Will you be utilizing an automated system to send orders into the market without human intervention (i.e., algorithmic system)?

- ☐ Yes 你是否会使用一个无需人工干预的自动交易系统来发送订单?
- ☒ No

Set Up your Security Questions and Answers: 设置三个安全问题和答案。

What is the name of your favorite childhood friend?

apple

What school did you attend for sixth grade?

snow

Who was your childhood hero?

spiderman



25%

Personal Information - Primary Account Holder

个人信息-主账户持有人

First Name\*:

Shen

名:

Middle Name:

Middle Name

中间名:

Last Name\*:

Chen

姓:

Address 1\*:

No. 1 Jian Guo Men Wai Da Jie

地址行一:

Address 2:

3 Hao Yuan

地址行二:

Country\*:

CHINA

国家:

State/Province:

州、省:

City\*:

城市:

Beijing

Zip/Postal Code\*:

邮编:

100001

Daytime Phone\*:

日间联系电话:

861087654321

Evening Phone:

夜间联系电话:

861087654321

Email Address\*:

电子邮箱:

chenshen@gmail.com

Confirm Email

Address\*: 确认电子邮箱

chenshen@gmail.com

地址行一填写家庭住址  
的路名或街道名, 地址  
行二填写门牌室号。

We checked your address with google - Can we use this Address below:

这是系统通过谷歌查询了你的地址信息后得出的结果，若你希望用谷歌的结果就点Yes, 否则就点No, 使用你原有的输入信息。

No Match Found, proceed using the address i entered.

Yes

No - Use my inputs



Account Type: Individual

30%

Personal Information - Identification and Citizenship

个人信息 - 身份和国籍

Are you a US Citizen?: ☐ Yes ☒ No

你是美国公民吗？

Have you been issued a US Social ☐ Yes ☒ No

Security Number?: 你是否有美国社会安全号？

Government Issued ID/Tax IR Number  
(for non-US persons)\*:

1000000000000000

非美国人士，填写政府颁发的身份证件号或缴税号

Date Of Birth\*:

12/02/1989

出生日期：

Marital Status\*:

☐ Married ☒ Single

婚姻状况：

已婚

单身

Number Of Dependents\*:

0

家庭成员人数（不含本人在内）

Country of Citizenship\*:

国籍所在国家：

CHINA

Passport Number\*:

护照号码：

G888888

Account Type: Individual

35%

Employment Information

就业信息

Employer\*:

工作单位名称：

ABC Company

Business Phone\*:

工作电话：

861066668888

Address\*:

工作单位地址：

No.2 San Li Tun, Room 3010

Country\*:

所在国家：

CHINA

State/Province:

州、省：

City\*:

城市：

Beijing

Zip Code\*:

邮编：

100001

Job Type/Position\*:

工作种类/职务：

Administrative

Nature of the

business\*:

工作单位的业务性质：

manufacturing

Web Address:

公司网址：

www.abc.com

Have you been in this position for 3 years or more?: 是否3年或以上？

☐ Yes

☒ No

若少于3年，需要进一步提供之前工作信息

Have you been in this position for 3 years or more?\*

☐ Yes

☒ No

这里选择No, 表示从事  
现在的工作少于3年。

Previous Employer\*:

之前的工作单位名称:

DEF Company

Business Phone\*:

工作电话:

861099995555

Address\*:

工作单位地址:

No. 3 Jin Rong Jie, Suite C

Country\*:

国家:

CHINA

State/Province:

州、省:

City\*:

城市:

Beijing

Zip Code\*:

邮编:

100001

Job Type/Position\*:

工作种类/职务:

Administrative

点此继续



CONTINUE

Account Type: Individual

DashE

40%

Financial Data

财务信息

Annual Income\*:

年收入:

\$50,000 - \$70,000

Net Worth\*:

个人总资产:

\$500,000 - \$1,000,000

Estimated Liquid Net Worth (excluding residence and other illiquid assets)\*:

个人流动资产预估值 (不包含房产和其它非流动性资产):

Amount expected to be deposited into trading account\*:

预计存入该期货交易账户的资金数额:

What is your source of risk capital for trading this new futures account? \*:

用于交易该期货账户的风险资本的来源是什么?

请点开下拉菜单选择一项:

1. 就业收入
2. 自有产业的经营性收入
3. 遗产
4. 储蓄

\$250,000 - \$300,000

10000

-Please Select-

Investment Experience

投资经验

Stocks/Bonds\*:

股票/债券:

☒ Yes ☐ No

If "Yes", number of years:

如是, 填写交易的年数:

10

Funds\*:

基金:

☒ Yes ☐ No

If "Yes", number of years:

如是, 填写交易的年数:

5

Futures/Commodities\*:

期货/商品:

☒ Yes ☐ No

If "Yes", number of years:

如是, 填写交易的年数:

3

Past Trading Firm:

(optional)

过去在哪家期货公司开过期货账户 (可以不填)

XYZ Brokerage

Trading Objective\*:

交易目的:

☒ Speculation ☐ Hedging

投机

对冲

除了从事对应交易产品相关的  
现货贸易或生产商之外,  
其它均为“投机”账户。



Do you understand the following

你是否理解以下问题？

The risk of loss in commodity futures trading?\*: 商品期货交易的损失风险？

☒ Yes ☐ No

The leverage provided in commodity futures and options trading?\*: 商品期货和期权交易中提供的杠杆？

☒ Yes ☐ No

The possibility of incurring a debit balance?\*: 账户产生赤字的可能性？

☒ Yes ☐ No

That you may be required to deposit additional funds to margin your account?\*: 你可能需要追加资金来满足保证金要求？

☒ Yes ☐ No

以上几个问题你必须充分理解后才能开户。  
对此如有疑问，请和你的账户经理咨询。

点此继续



CONTINUE

Account Type: Individual



45%

Affiliations

关联

(1) Are you: A member of the NFA or any exchange?\*: 你是NFA或任何交易所的会员吗？

☐ Yes ☒ No

(2) Are you: Registered with the CFTC or NFA?\*: 你在CFTC或NFA注册过吗？

☐ Yes ☒ No

(3) Are you: An employee of or related to any employee of any Brokerage firm, the CFTC, NFA, or any exchange?\*: 你是任何一家券商，CFTC，NFA，或交易所的雇员或者与这些机构的员工有关联吗？

☐ Yes ☒ No

(4) Are you: Are you a current or former senior official of a foreign government or political party, or senior executive of a foreign government-owned commercial enterprise, an entity or business formed for the benefit of such person, or a family member or close associate of such person or a "foreign shell bank"?\*: 你目前是或者曾经是国外某政府或政党的高级官员，或国外政府所有的企业中的高级管理人员，为其利益而设立的商业机构，或其家庭成员或与之密切相关的人士，或是一家“国外的空壳银行”？

☐ Yes ☒ No

(5) Have you or your spouse, or any organization of which you were a director, officer, manager, partner, or owner filed for bankruptcy, been subject to receivership, made an assignment for benefit of creditors, or similar actions, voluntarily or involuntarily in the last 3 years?\*: 在过去三年中你或你的配偶，或者任何一家你曾经是业主的或担任过董事，官员，经理，合伙人的机构，曾经宣布过破产，接受过清算处置吗？

☐ Yes ☒ No

(6) Does anyone else have a financial interest in, guarantee, or control of this account?\*: 是否有其他人士对此账户同时拥有财务兴趣，对其进行担保或控制？

☐ Yes ☒ No

(7) Does any person other than the owner(s) of the account have the authority to trade this account?\*: 除了账户持有人以外，是否还有其他人士有权交易该账户？

☐ Yes ☒ No

(8) What will be the primary basis of your trading decisions?

你的交易决定主要是基于什么？

Own Research



第7个问题如回答是肯定的，则该账户为“授权账户”。作为授权账户，账户持有人需要填写相应的授权文件同意被授权一方无需事先征得同意即可作出买卖交易之决定。



请在下拉菜单中选择一项：

1. 自己研究分析
2. 经纪人的建议
3. 其它

点此继续



CONTINUE

Account Type: Individual



Bank Account Information

银行账户信息

*This information may be used by our Treasury Department to identify your incoming deposit.  
List at least 1 bank account to proceed and you can add upto a maximum of 5 bank accounts*

所提供的银行账户信息可能被清算公司财务部门用来识别你的汇入资金。  
请至少列明一个银行账户的信息，最多可以列出5个你名下的银行账户信息。

Add Bank Account

↑  
点此按钮，添加银行账户。

Add a Bank Account

添加一个银行账户

Country\*:  
国家：

CHINA

State\*:  
州：

City\*:  
城市：

Beijing

Bank Name\*:  
银行名称：

Bank of China

Account Number\*:  
银行帐号：

12345678910

Type of Account\*:  
账户类型：

☐Checking  
支票账户

☐Money Market  
货币市场账户

☒Savings  
储蓄账户

点此添加账户 ➡ 

Add Account

Cancel

Account Type: Individual



50%

#### Bank Account Information

This information may be used by our Treasury Department to identify your incoming deposit.  
List at least 1 bank account to proceed and you can add upto a maximum of 5 bank accounts

Bank Name	Account Number	Account Type	Country	State	City	
Bank of China	12345678910	Savings	CHINA		Beijing	

Add Bank Account

点此添加一个银行账户



Account Type: Individual

20%

#### DISCLOSURES AND AGREEMENTS:

- Scroll down to Read and Agree to proceed.
- You will have option to review, print all these agreements again before submitting your application
- Agreements and Disclosures are required to be completed with data inside if needed.

#### 风险声明

#### RISK DISCLOSURE STATEMENT

The risk of loss in trading commodity futures contracts can be substantial. You should, therefore, carefully consider whether such trading is suitable for you in I should be aware of the following points:

- (1) You may sustain a total loss of the funds that you deposit with your broker to establish or maintain a position in the commodity futures market, and you may moves against your position, you may be called upon by your broker to deposit a substantial amount of additional margin funds, on short notice, in order to ma funds within the time required by your broker, your position may be liquidated at a loss, and you will be liable for any resulting deficit in your account.
- (2) The funds you deposit with a futures commission merchant for trading futures positions are not protected by insurance in the event of the bankruptcy or ins event your funds are misappropriated.

By accepting [or clicking button] this document and forwarding it to transact via the internet, i/we acknowledge that i/we have read and understand the foregoing and intend to rely upon it and that i/we intend to be bound thereby. i/we undertand and agree that my/our electronic signature is the equivalent of a manual signature and that transact may rely upon it as such.

Decline

同意并继续



Agree and Continue



20%

**DISCLOSURES AND AGREEMENTS:**

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**客户协议**

Customer Agreement

Accompanying this Customer Agreement is a "Risk Disclosure Statement for Futures" which is required to be provided to you by the Commodity Futures Trading Commission ("CFTC"). Please read the Risk Disclosure Statement carefully before signing the related acknowledgments contained herein.

In consideration of TRANSACT FUTURES, a division of YORK BUSINESS ASSOCIATES, L.L.C. ("TRANSACT") acting as broker with respect to one or more accounts (the "I

**25. ACKNOWLEDGMENT OF DISCLOSURES AND SIGNATURE**

CUSTOMER HEREBY UNDERSTANDS THE CUSTOMER ACCOUNT AGREEMENT AND CONSENTS AND AGREES TO ALL OF THE TERMS AND CONDITIONS OF AGREEMENT SET FORTH ABOVE. CUSTOMER ACKNOWLEDGES THAT TRADING IN COMMODITY INTERESTS IS SPECULATIVE, INVOLVE A HIGH DEGREE OF RISK AND IS APPROPRIATE ONLY FOR PERSONS WHO CAN ASSUME RISK OF LOSS IN EXCESS OF THEIR MARGIN DEPOSIT. **CUSTOMER ACKNOWLEDGES THAT CUSTOMER HAS READ, UNDERSTANDS AND ACCEPTS THE RISKS OF USING THE TRANSACT SYSTEM, INCLUDING AUTOMATIC LIQUIDATION.**

I hereby acknowledge that I have read, understand and accept  
paragraph 10.

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Decline

点此同意并继续



Agree and Continue



20%

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**电子交易和订单路由系统声明文件****ELECTRONIC TRADING AND ORDER ROUTING SYSTEMS DISCLOSURE STATEMENT**

Electronic trading and order routing systems differ from traditional open outcry pit trading and manual order routing methods. Transactions using an electronic rules and regulations of the exchange(s) offering the system and/or listing the contract. Before you engage in transactions using an electronic system, you should read the rules and regulations of the exchange(s) offering the system and/or listing contracts you intend to trade.

**DIFFERENCES AMONG ELECTRONIC TRADING SYSTEMS**

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Decline

同意并继续



Agree and Continue

Account Type: Individual

20%

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**关于市场行情数据的通知**

**UNIFORM NOTIFICATION REGARDING ACCESS TO MARKET DATA**

As a market user you may obtain access to Market Data available through an electronic trading system, software or device that is provided or made available by an affiliate of such. Market Data may include, with respect to products of an exchange ("Exchange") or the products of third party participating exchange, the Exchange's electronic trading platform ("Participating Exchange"), but is not limited to, "real time" or delayed market prices, opening and closing price, settlement prices, estimated and actual volume information, bids or offers and the applicable sizes and numbers of such bids or offers.

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Decline

点此同意并继续



Agree and Continue

Account Type: Individual

20%

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**对于TRANSACT可能作为交易对手的订单操作的授权许可**

**AUTHORIZATION FOR TRANSACTIONS IN WHICH TRANSACT MAY BE ON THE OTHER SIDE**

The customer consents to transactions whereby other customers of TRANSACT, TRANSACT, its managing directors, officers, employees and/or any affiliate or parent company of TRANSACT or any floor broker utilized by TRANSACT may be on the opposite side of orders in Commodity Interests placed for such Customer's Account provided that such transactions are in conformity with regulations of the Commodity Futures

**Authorization for Transactions in Which Transact My Be On  
the Other Side**

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Decline

点此同意并继续



Agree and Continue

Account Type: Individual

20%

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**有关你的财务隐私权利**

**NOTICE OF YOUR FINANCIAL PRIVACY RIGHTS**

This is our privacy notice for our customers. When we use the words "you" and "your" we mean all of our consumers or customers who have a continuing relationship with us.

We will tell you the sources for nonpublic personal information we collect on our customers. We will tell you what measures we take to secure that information.

**THE CONFIDENTIALITY, SECURITY AND INTEGRITY OF YOUR NONPUBLIC PERSONAL INFORMATION**

We restrict access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

By accepting [or clicking button] this document and forwarding it to transact via the internet, i/we acknowledge that i/we have read and understand the foregoing and intend to rely upon it and that i/we intend to be bound thereby. i/we understand and agree that my/our electronic signature is the equivalent of a manual signature and that transact may rely upon it as such.

Decline

点此同意并继续



Agree and Continue

Account Type: Individual

 DashBo

20%

**DISCLOSURES AND AGREEMENTS:**

- Scroll down to Read and Agree to proceed.
- You will have option to review, print all these agreements again before submitting your application
- Agreements and Disclosures are required to be completed with data inside if needed.

以下文件适用于授权账户。如果你的账户是授权委托他人（包括商品交易顾问）来交易的，需要签署这个授权文件。

THIS DISCRETIONARY ACCOUNT TRADING AUTHORIZATION AND SUBSEQUENT ACKNOWLEDGMENTS ARE TO BE COMPLETED ONLY IF CUSTOMER IS REPRESENTED BY AND ACTING THROUGH AN ACCOUNT MANAGER/COMMODITY TRADING ADVISOR.

Customers that authorize other persons to trade in futures contracts and option contracts on their behalf must either (1) complete and execute the Trading Authorization set forth or (2) furnish TRANSACT with such other authorization acceptable to TRANSACT under which Customer gives trading authority over Customer's Account to a third party.

**DISCRETIONARY ACCOUNT TRADING AUTHORIZATION**

To: TransAct Futures

**授权账户的交易授权文件**

The undersigned Customer ("Customer") hereby authorizes the below-named Account Manager as Customer's agent and attorney-in-fact to buy and sell (including short sales)

By accepting [or clicking button] this document and forwarding it to transact via the internet, i/we acknowledge that i/we have read and understand the foregoing and intend to rely upon it and that i/we intend to be bound thereby. i/we understand and agree that my/our electronic signature is the equivalent of a manual signature and that transact may rely upon it as such.

Decline

点此同意并继续



Agree and Continue

Account Type: Individual

 DashBoard

20%

**DISCLOSURES AND AGREEMENTS:**

- Scroll down to Read and Agree to proceed.
- You will have option to review, print all these agreements again before submitting your application
- Agreements and Disclosures are required to be completed with data inside if needed.

请注意，客户不一定需要同意仲裁协议来完成开户。

THE FOLLOWING ARBITRATION AGREEMENT IS OPTIONAL AND MAY BE DECLINED BY CUSTOMER. PLEASE REVIEW THESE PROVISIONS CAREFULLY BEFORE SIGNING.

ARBITRATION AGREEMENT

仲裁协议

**以单个账户持有人名义开户**

**ACCOUNT OPENING WITH A SINGLE OWNER**

This is to confirm that no person or entity has any interest in the Account or Sub-Account(s) to which the signed Customer Agreement pertains to other than myself. I will be investing are solely my own.

If at any time in the future this should change, I agree to notify you immediately.



BACKUP WITHHOLDING and TRANSACTION REPORTING REQUIREMENTS COMBINED W-9, W-8, and 1099-B CERTIFICATIONS

Name:

W-9, W-8, 1099-B合并税务申报文件

Address:

WARNING

Unless you complete EITHER the W-9 or the W-8 Sections, i.e., you fail to furnish us with the correct taxpayer identification number or an exemption certificate as a "Foreign Person," we must generally withhold 20% of withdrawals and payments from your account. If this account is exempt from REPORTING on Form 1099-B, complete the 1099-B Section.

W-9

Section

Payers Request for  
Identification Number

Part I - For United States Citizens, Legal Entities or Residents. Taxpayer Identification Number.

For most individual taxpayers, the taxpayer identification number is the social security number.

NOTICE: For individual, joint, custodian and sole proprietorship the social security number is to be used.

Part II - Initial the box if you are NOT subject to backup withhold under the provision of section 3406(a)(1)(C) of the Internal Revenue code.

Social Security Number:

OR

Employer Identification Number:

美国公民，在美注册机构以及在  
美居留人士，请填写W-9表。

W-8 Section

非美国人士填写

在此输入你的姓名

Foreign Person Exemption Initial here Shen Che if this is the account of an EXEMPT FOREIGN PERSON meeting each of the following requirements:

1. You are neither a citizen nor a resident of the United States;
2. You have not been nor plan to be in the U.S. for a period aggregating 183 or more days during the calendar year; and
3. You do not expect to engage in trade or business in the United States with respect to which any gain derived from transactions effected by the broker during that calendar year is effectively connected.

符合以下条件者，填写W-8免税表：

1. 你既不是美国公民也不是在美居留的外国人。
2. 在本年度内你没有或者计划累积在美国逗留超过183天。
3. 你在本年度内的期货交易所得不会与你在美国从事的任何贸易或者商业活动有效关联。

Name:

Street:

City: Country:

CERTIFICATION Under the penalties of perjury, I certify that the information provided on this form is true, correct, and complete for Sections W-9 or W-8 and 1099-B (if applicable).

TRANSACTION FUTURES ADDITIONAL RISK DISCLOSURE

TRANSACTION FUTURES 额外风险声明

The information contained in your account application indicates to us that your current status can be described by at least one of the following conditions:

- Retired, or
- Under 21 years old, or
- Has an annual income of \$25,000 or less, or
- Has a net worth of \$50,000 or less, or
- Less than one year of commodity futures or commodity options trading experience, or
- Funds are for retirement (e.g. IRA, Keogh, etc.)

符合以下情形之一的人士需要签署这份额外风险声明:

1. 退休人士
2. 未满21岁
3. 年收入低于2万5千美元
4. 个人总资产低于5万美元, 5. 期货或期权交易不满1年
5. 资金来自退休养老账户

While Transact Futures is prepared to open your futures trading account, we strongly urge you to carefully consider this decision, given your current situation. Commodity futures trading is generally considered to be risky investment. If you have typically pursued conservative forms of investment in the past, you may wish to study commodity futures trading further before continuing an investment of this nature.

ACKNOWLEDGEMENT

I have considered the financial risks involved in trading commodity futures with regard to my personal situation and I wish to proceed with opening an account. I fully understand the nature of commodity futures trading, and I realize that I can sustain a total loss of any deposited funds. I acknowledge that any funds I commit are purely risk capital, and loss of my investment will not compromise my standard of living, retirement plans, or prior obligations to others.



From this dashboard you can:

1. Review the overall status of your application
2. Navigate and finish the pending parts of your application
3. SUBMIT your application for TransAct approval processing.

至此，你的在线开户申请基本完成了。如下页面显示了你的申请文件完成状态， Complete表示已完成，在递交前你可以：

1. 点View进入某个部分进行查看
2. 修改并完成相关内容
3. 然后递交申请。

Application Section	Status	Navigate to section
<input checked="" type="checkbox"/> Personal Information - Identification and Citizenship	Complete	<a href="#">View</a>
<input checked="" type="checkbox"/> Employment Information	Complete	<a href="#">View</a>
<input checked="" type="checkbox"/> Financial Information	Complete	<a href="#">View</a>
<input checked="" type="checkbox"/> Affiliations Information	Complete	<a href="#">View</a>
<input checked="" type="checkbox"/> Bank Account(s) Information	Complete	<a href="#">View</a>
<input type="checkbox"/> Document Upload Center	Optional	<a href="#">View</a>
<input checked="" type="checkbox"/> Agreements & Disclosures	Complete	

点此递交申请



SUBMIT APPLICATION

递交之后，会看到如下提示：

Success! your Application is submitted. We will get back to you shortly with updates about your application status.