

1

Learn about Micawber and determine if becoming a client is appropriate

- [SMA Brochure](#)
- [Suitability Survey](#)



2

Sign an Investment Advisory Agreement and return to Micawber

- [Contract](#)



3

Open your account at Interactive Brokers

- You will receive an email invite to complete your application



4

Fund your account with any of the following:

- Cash
- Stocks
- Bonds

