Definitions of Mutual Fund Account Opening Forms

**BNY Mellon Family of Funds Account Application**
To open an individual, joint, custodian account, trust, corporation, estate, or partnership.

**Individual Retirement Account Application – Rollover and Transfer Kit**
To open an IRA account and initiating a transfer or direct rollover.

**Individual Retirement Account Application**
To open an IRA account

**Coverdell Education Savings Account (ESA) Application**
To establish a Coverdell Education Savings Account for an eligible designated beneficiary.

**Coverdell Education Savings Account (ESA) Application – Transfer Kit**
To transfer or directly roll over all or a portion of your Coverdell Educations Savings Account to a Coverdell Education Savings Account.