



## Setting Up an Account in TreasuryDirect

To set up an account in TreasuryDirect, follow these steps:

- 1 Open your Internet browser and type "www.treasurydirect.gov" in the address window.
- 2 On the TreasuryDirect home page, in the upper right corner, select "Open an Account."
- 3 On the "TreasuryDirect - Open an Account" page, select "TreasuryDirect."
- 4 Read the three steps on the "Open An Account >> Intro" page.
- 5 To open an Individual TreasuryDirect account, make sure you have these things:
  - ▶ A Social Security Number.
  - ▶ A United States address of record.
  - ▶ A checking or savings account.
    - You'll need to know your account and routing numbers.
  - ▶ An e-mail address.
    - E.g., YourName@abc.com
  - ▶ A web browser that supports 128-bit encryption.

6 Once you have gathered what you need, click the “Apply Now” button at the bottom of the screen.

7 Choose “Individual” as the type of account you would like to open and then click “Submit.”

**Open An Account » Account Type**

To create an online TreasuryDirect Account, you must first select the type of account you wish to establish.

**Individual Account**  Individual

**Entity Account** [Learn more about Entity Accounts](#)

**Business or Organization**

- Corporation  
Example: ABC Corporation
- Partnership  
Example: Smith and Jones Con
- Limited Liability Company (LLC)  
Example: Summit Consulting Se
- Professional Limited Liability Co  
Example: Paine Dental Associat
- Sole Proprietorship  
Example: John Doe DBA Doe Pl

**Estate or Trust**

- Deceased Estate  
Examples: John Doe, Executor ( Doe, Administrator of the Estate Legal Representative of the Est
- Living Estate  
Example: John Doe, Legal Guar
- Trust  
Examples: John Doe, Trustee u 1, 2001; Jane Doe or Sarah Jones, Trust dated January 1, 2001; Sarah Jones, Trustee under the

**Submit** **Return**

8 Complete the online application.

**Open An Account » Individual Account Application**

[Privacy & Legal Notices](#)

**Account Owner Information**

First Name: \*

Middle Name or Initial:

Last Name: \*

Suffix:

Give Your Account a Name:   
(Example: Mike's Account)

Taxpayer Identification Number: \*  -  -

Date of Birth: \*  -  -  (MM-

Driver's License/State ID Number:

Issuing State:

Expiration Date:  -  -  (MM-

**Contact Information**

Street Address: \*

City: \*

State: \*

Zip Code: \*  -  (Plus Four

Phone \* **One phone number is req**

Home:   -

Work :   -  Ex

Cell :   -

E-mail Address: \*

Retype E-mail Address: \*

**Bank Information**

Bank Name: \*

Routing Number: \*

Account Number: \*

Name(s) on the Account: \*

Account Type: \*  Checking  Savings

**Submission**

**Taxpayer Identification Number Certification**

By checking this box I certify, under penalty of perjury, that:

- The number shown on this form is my correct taxpayer identification number.
- I am not subject to backup withholding because: (a) I am exempt from back notified by the Internal Revenue Service (IRS) that I am subject to backup w all interest and dividends, or (c) the IRS has notified me that I am no longer :
- I am a U.S. person.

**Submit** **Cancel**

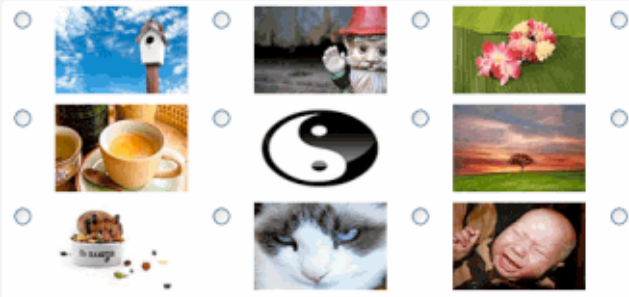
9 Click "Submit" when you've completed the application.

10 Choose your personalized image and caption and then click "Submit."

### Access Your Account » Personalized Image/Caption

A personalized image/caption will help you to know that you are on the authentic TreasuryDirect website. Your personalized image and caption will be displayed on your password page.

Please choose a personalized image.



Please enter a caption.  (3 - 30 alphanumeric characters)

11 Choose your password and security questions and then click "Submit."

### Open an Account » Choose a Password

[? Learn more about Security Features and Protecting Your Account.](#)

#### Choose a Password

When selecting your password, avoid numbers, names or dates that are commonly used, such as a number, first name, or date of birth.

Enter your password:

Use at least one letter and one number.

Retype your password:

#### Choose a Password Reminder

In case you forget your password, we'll give you a password reminder. You may not use your password as your password reminder.

Enter your password reminder:

#### Answer Three Security Questions

Answer **three** security questions below and provide a different answer for each. If you provide the same answer for two or more questions, we'll use these questions to confirm your identity. We may use these questions when you attempt to perform certain transactions.

Who was your best friend in high school?

What was your first pet's name?

What was your favorite teacher's name?

What was the first car you owned?

Who would you most like to meet?

What is the location of your dream vacation?

Who is your favorite author?

What is your favorite movie?

### It's that simple!

You've established a personal account with the U.S. Department of the Treasury. Be sure to check your e-mail to retrieve your TreasuryDirect account number.

TreasuryDirect

### Thanks for opening a TreasuryDirect account

Your account number is D-123-456-789.

Note: When logging into your account, you will provide your account number and password. You also will receive an e-mail with a one-time passcode and further instructions.