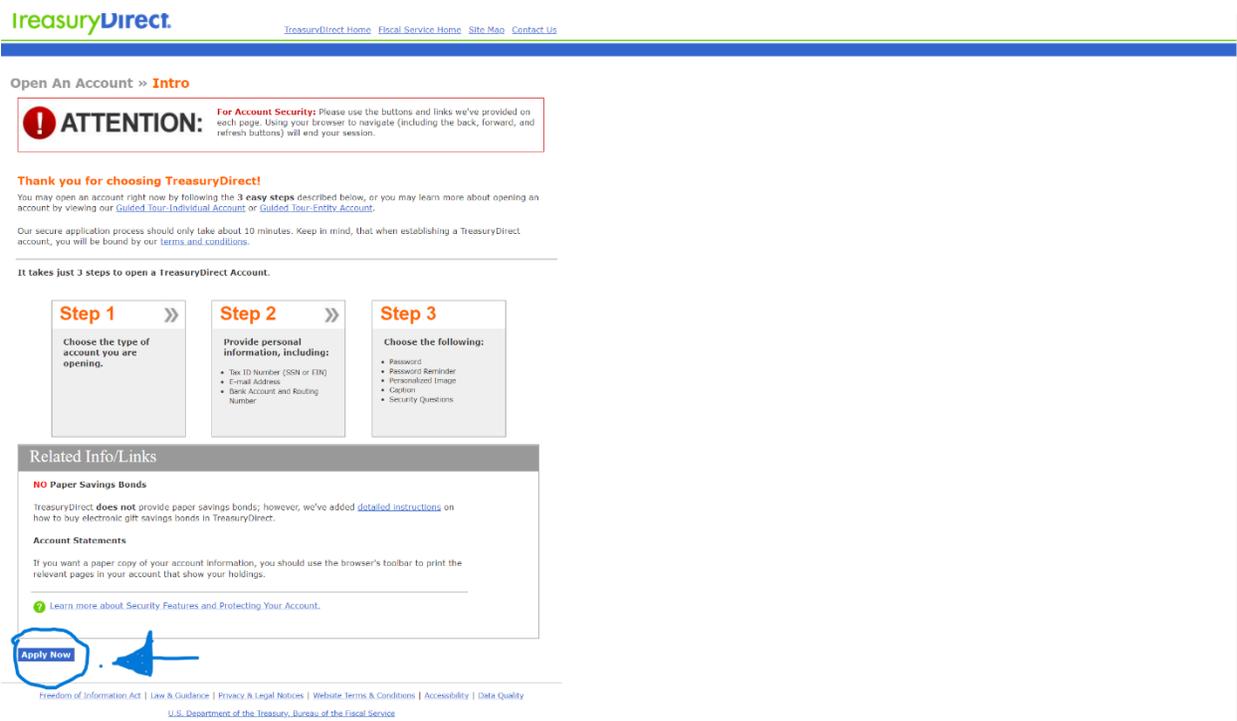


How to Purchase Series I Bonds During Times of Inflation

These instructions will help you to navigate the Treasury Direct website. This is the governments website where you can purchase all different types of government bonds directly from them. Series I Bonds, can only be purchased on this website, not through your Financial Advisor, thus it's why we have put together these instructions.

1. Visit the website below, which can be found by [clicking this link](#).
2. Click the "Apply Now" Blue Button at the bottom of your page



The screenshot shows the TreasuryDirect website interface. At the top, there is a navigation bar with links for TreasuryDirect Home, Fiscal Service Home, Site Map, and Contact Us. Below the navigation bar, there is a section titled "Open An Account » Intro". A prominent red box with a white exclamation mark and the word "ATTENTION:" contains a security warning: "For Account Security: Please use the buttons and links we've provided on each page. Using your browser to navigate (including the back, forward, and refresh buttons) will end your session." Below this, a message says "Thank you for choosing TreasuryDirect!" and provides instructions on how to open an account, mentioning "3 easy steps" and linking to "Guided Tour-Individual Account" and "Guided Tour-Empty Account". A note states that the secure application process should only take about 10 minutes. Below this, a section titled "It takes just 3 steps to open a TreasuryDirect Account." displays three steps in a row: Step 1: "Choose the type of account you are opening." Step 2: "Provide personal information, including:" with a bulleted list: Tax ID Number (SSN or EIN), E-mail Address, and Bank Account and Routing Number. Step 3: "Choose the following:" with a bulleted list: Password, Password Reminder, Personalized Image, Caption, and Security Questions. Below the steps is a "Related Info/Links" section with three items: "NO Paper Savings Bonds" (explaining that TreasuryDirect does not provide paper savings bonds but offers detailed instructions on how to buy electronic gift savings bonds), "Account Statements" (explaining how to print a paper copy of account information), and a link to "Learn more about Security Features and Protecting Your Account." At the bottom of the page, a blue "Apply Now" button is circled in blue, and a blue arrow points to it from the right. The footer contains links for Freedom of Information Act, Law & Guidance, Privacy & Legal Notices, Website Terms & Conditions, Accessibility, and Data Quality, along with the text "U.S. Department of the Treasury, Bureau of the Fiscal Service".

3. It should default to opening an individual account. Remember, each person is allowed to purchase \$10,000 worth of I Bonds, each year. Thus, you'll need to open an account for yourself and if your married, you'll want to set up an account for them, to deposit an additional \$10,000.

[Intro](#) [Online Application](#)

Open An Account » **Account Type** Progress: Step 1 Step 2 Step 3

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

Individual Account [Learn more about these Accounts](#)

Individual 

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

Business or Organization

- Corporation**
Example: ABC Corporation
- Partnership**
Example: Smith and Jones Construction Company, a partnership
- Limited Liability Company (LLC)**
Example: Summit Consulting Service, LLC
- Professional Limited Liability Company (PLLC)**
Example: Paine Dental Associates, PLLC
- Sole Proprietorship**
Example: John Doe DBA Doe Plumbing Supplies

Estate or Trust

- Deceased Estate**
Examples: John Doe, Executor U/W of William Jones, deceased; John Doe, Administrator of the Estate of William Jones, deceased; John Doe, Legal Representative of the Estate of William Jones, a decedent
- Living Estate (Court-Appointed Only)**
Example: John Doe, Legal Guardian of William Jones
- Trust**
Examples: John Doe, Trustee under Declaration of Trust dated January 1, 2001; Jane Doe or Sarah Jones, Trustees under Agreement with John Doe dated January 1, 2001; Sarah Jones, Trustee under the Will of John Doe, deceased

[Submit](#) [Return](#)

[Freedom of Information Act](#) | [Law & Guidance](#) | [Privacy & Local Notices](#) | [Website Terms & Conditions](#) | [Accessibility](#) | [Data Quality](#)
U.S. Department of the Treasury, Bureau of the Fiscal Service

- Next, you'll be asked to input your personal information into Treasury Direct to open an account. One item, that you may not have readily available is your drivers license number and expiration along with your bank routing and account number. (go to next page for screenshot)



Account Owner Information

Notes Required Fields

First Name: *

Middle Name or Initial:

Last Name: *

Suffix:

Give Your Account a Name:
This is a personalized account name. It does NOT reflect account ownership or security registration.

(Example: Mike's Account)

Taxpayer Identification Number: * - -

Date of Birth: * - - (MM-DD-YYYY)

Driver's License/State ID Number:

Issuing State:

Expiration Date: - - (MM-DD-YYYY)

Contact Information

Street Address: *

City: *

State: *

Zip Code: * - (Plus Four - Optional)

Phone * **One phone number is required.**

Home: () -

Work: () - Ext:

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

- After you complete inputting your personal information, the system will ask you to set up a security image, create a password and create security questions. Finally, they'll send to your email address, your account number with Treasury Direct, which will allow you to login in. The website you'll return to, when ready to purchase bonds can be found by [clicking this link](#).
- After logging back into the website, you should be brought to a screen that shows your account, currently with nothing in it today. You'll then want to click the "BuyDirect®" link at the top of the webpage, which will begin your purchasing process.



TreasuryDirect.

[How do I...?](#) [What's New](#) [Contact Us](#)

- [My Account](#)
- [BuyDirect®](#)
- [Current Holdings](#)
- [ManageDirect®](#)
- [Account Info](#)
- [History](#)
- [Investor InBox](#)
- [Gift Box](#)

Welcome to **Your Account Summary, John-Mark**

John-Mark:

Buy and manage U.S. Treasury securities online.

Important message:
- Please use the buttons and links we've provided on each page. Using your browser to navigate (including the back, forward, and refresh buttons) will end your session. For security reasons, we recommend you close your Web browser when you are finished accessing your account.

You have **1 message(s)** in your [Investor InBox](#).

- Your Current Securities Total:** \$.00
- Your Gift Box Total:** \$.00
- Your Zero-Percent C of I Total:** \$.00
- Your Payroll Zero-Percent C of I Total:** \$.00

Primary Account Information

Current Holdings

Security Type	Amount
MARKETABLE SECURITIES	\$.00
SAVINGS BONDS	\$.00
Zero-Percent C of I	\$.00
Payroll Zero % C of I	\$.00

Gift Securities

Type	Amount
Gifts Purchased by You	\$.00

Account Activity

[View a summary](#) of your recent purchases, payments, and other activity for your Primary Account.

Linked Accounts Information

Accounts Listing

Name	Type	InBox Msg	Amount
None Established			

[Learn more about Linked Accounts.](#)

Info Direct

Important 1099 tax information can now be viewed in your account under the ManageDirect tab by clicking the appropriate tax year under "Manage My Taxes."

It is important to check all accounts, as a separate 1099 will be created for each account. If you have established Custom, Minor, or Conversion-Linked accounts, you must access each one individually to print the form.

Please see your investor inbox message for a link to a video on how to access your 1099.

A 1099 will not be mailed to you.

- [Learn more about Security Features and Protecting your Account.](#)
- [Learn more about C of I.](#)
- [Learn more about the Payroll Savings Plan.](#)
- [Learn more about Payroll C of I.](#)
- [Learn more about Security Types.](#)
- [Learn more about the Auction Process.](#)



- Once you click “BuyDirect®” you’ll be brought to a screen where you’ll be asked what type of Treasury Bond you’d like to purchase. This is where you’ll select, under **Savings Bonds**, the **Series I – An accrual-type security with a combination interest rate of a fixed and an inflation rate**. See the screen shot below for confirmation, you’re purchasing the correct bond.

TreasuryDirect Help Logout
How do I...? What's New Contact Us

My Account **BuyDirect** Current Holdings ManageDirect Account Info History Investor Info Gift Box

BuyDirect John-Mark [redacted]

[Learn more about Security Types.](#)

Marketable Securities

- Bills - Short-term securities of 1 year or less
- Notes - Medium-term fixed-principal securities of 2 to 10 years
- Bonds - Long-term fixed-principal securities of more than 10 years
- TIPS Notes/Bonds - Medium or long-term Treasury Inflation-Protected Securities of 5 to 30 years
- FRN - Medium-term Floating Rate Notes

[View Tentative Auction Calendar.](#)
[View recent auction results.](#)

Savings Bonds (NO Paper Savings Bonds)

- Series EE - An accrual-type security with a fixed interest rate
- Series I - An accrual-type security with a combination interest rate of a fixed and an inflation rate

Zero-Percent Certificate of Indebtedness

- C of I - A non-interest bearing security which can be used to fund TreasuryDirect purchases

[Learn more about Tax Reporting.](#)

Submit Cancel

Freedom of Information Act | Law & Guidance | Privacy & Legal Notices | Website Terms & Conditions | Accessibility | Data Quality
U.S. Department of the Treasury, Bureau of the Fiscal Service

- Finally, this last screen will ask you what amount you’d like to purchase and it’ll confirm the source of funds, which should be the bank account, you linked earlier in the process. As a reminder, you’ll need to purchase at least, \$25.00 and no more than \$10,000 in I bonds. It would not be our recommendation, that you schedule a re-occurring deposit into these because, your reoccurring deposits (dollar cost averaging) should be in things that provide better, long term growth opportunities. Please contact [your financial advisor](#) for more specific help.

The following error(s) have occurred:
- Purchase Amount must be at least \$25.00 and may not exceed \$10,000.00.

BuyDirect » Savings Bonds John-Mark [redacted]

Purchase Series I Savings Bonds.

Registration Information
Your preferred registration appears below. To use a different registration, choose one from the drop-down list or add another by clicking the Add New Registration button.

John-Mark Caller Young Add New Registration

Purchase Information

Product type: Series I Savings Bond
Purchase Amount: \$ 10000 Example: For a Purchase Amount of \$25.00 you pay \$25.00

Select a source of funds: [dropdown menu]

[Learn more about C of I.](#)
[Learn more about Purchase Limitations.](#)

Purchase Frequency

- Schedule single purchase for: 03 - 05 - 2022 (MM-DD-YYYY)
- Schedule repeat purchases.
 - How often: Weekly
 - Purchase Start Date: [] - [] - [] (MM-DD-YYYY)
 - Purchase End Date: [] - [] - [] (MM-DD-YYYY)
- Schedule purchases by selecting your own dates.
 - Purchase Date: [] - [] - [] (MM-DD-YYYY)
 - Purchase Date: [] - [] - [] (MM-DD-YYYY)
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 - Purchase Date: [] - [] - [] (MM-DD-YYYY)
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 - Purchase Date: [] - [] - [] (MM-DD-YYYY)
 - Purchase Date: [] - [] - [] (MM-DD-YYYY)

Submit Cancel Schedule More



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