

How to Open an Investment Account

Welcome to Dodge & Cox. We offer a variety of ways to invest in our value-oriented, no-load, low-cost mutual funds, and it's easy to open your account online. Let's assume you're new to Dodge & Cox and you want to open an individual account. To start, click "Open an Account." This begins your online application. To continue, select "Start an Application." Select your account type. If you're not sure, there are brief descriptions to guide you. From here, it's just four easy steps:

- Step one, tell us about yourself as the account owner and how you'd like your account documents delivered. Dodge & Cox uses a number of security measures to help keep your data safe.
- Step two, tell us how you're funding your investments. Let's assume you'll use a bank to transfer your funds. We'll verify your bank information in seconds on screen and via email.
- Step three, set up your investments. Select the Dodge & Cox Funds you initially want to purchase, fill in your investment amounts, and set up an automatic investment plan if you want. Then, confirm your cost basis method and how you want any dividends and capital gains distributed. If you don't want the preselected options, you can adjust them. Hover over any of these tool tip buttons for more information, and you can always contact us if you need help.
- Finally, create a username and password for your new account and review your information. Once you verify your account details and accept our terms of use, we'll confirm your new account. To view your new account, just click "Login to my Account" and that's it. You'll see your new Dodge and Cox account dashboard. Once your deposits are received, you'll see the Fund shares you purchased.

Investment Focus with Dodge & Cox