Margin call checklist (PDF)

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Fill in from your broker's margin agreement and account page.

Your account

House maintenance requirement (%) for each position _____

Current margin loan (debit balance) _____

Maintenance excess (cushion) _____

Fall in value that would trigger a call _____

If a call arrives

- [ ] How much cash can you deposit today?
- [ ] Which marginable securities could you transfer in?
- [ ] Which position would you sell first, and how much (call ÷ requirement)?
- [ ] Could the firm sell before your deadline? Read the agreement.
- [ ] After any sale, is there a debit balance you still owe?

Sources: FINRA: Know what triggers a margin call; FINRA: Margin accounts; FINRA Rule 2264: Margin disclosure statement; Investor.gov: Margin call. Full explanation and links: https://uxs.nz/basics/what-happens-if-you-cant-meet-a-margin-call-on-a-stock-account/

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