

# Add/Edit Firm For Online Account Transfers

Use this form to add or edit firms available for account transfers initiated online.

## Instructions:

1. Complete all fields on this form for adding or editing a firm or clearing firm.
2. Send this completed form as a PDF to us at [support@folioinstitutional.com](mailto:support@folioinstitutional.com).

## Important Notes:

- The Brokerage List is updated quarterly. Firms added/edited may not appear on the site immediately.
- Please make sure you include the four-digit NSCC Participant Number for each firm you add or edit. If your firm does not have a Participant Number, enter N/A.

## Add/Edit Firm for Online Account Transfers

Complete all fields. If you are completing this form to edit the information for a firm that is already on our online account transfer list, mark NC in the fields that have not changed.

<b>Firm Information</b>	Name			
	Phone Number (       )       -		Firm NSCC Participant #	
<b>Firm Address</b>	Address 1		Address 2	
	City	State	Zip Code	Country

If the firm you listed above has a clearing relationship with another firm, complete the following section.

<b>Clearing Firm Information</b> (if any)	Name			
	Phone Number (       )       -		Firm NSCC Participant #	
<b>Firm Address</b>	Address 1		Address 2	
	City	State	Zip Code	Country