

New Agent/CWeb Access Request

Section I Agent Information

Agent name:			
Trade name (or n/a)			
Street (Office Address)			
City, Province		Postal	
Phone		Fax	
Dealer/Rep Number**	/	email	
Admin/Assist. contact			
Admin/Assist. email			
Agent type	<input type="checkbox"/> Mutual Funds <input type="checkbox"/> Mortgages <input type="checkbox"/> Private Securities <input type="checkbox"/> Public Securities		

****The dealer rep number must be filled in if the client holds/plans to hold mutual funds.**

Section II Dealer Information (and/or Head Office Information)

Existing CWT Dealer	Y / N	CWT Agent #	
Company name			
Street			
City, Province		Postal	
Phone		Fax	
Dealer contact		email	
Admin/Assist. contact		email	

Section III CWT Administration

<input type="checkbox"/>	Mutual Fund Trading and settlement agreement form signed by dealership		
<input type="checkbox"/>	File set up in Agent Cabinet		
<input type="checkbox"/>	Regional representative notified		
<input type="checkbox"/>	New agent set up on excel file		
<input type="checkbox"/>	CWeb assigned & Agent notified	Login	
		Password	

NOTES:

<input type="checkbox"/>	Discussed Transfer Plan		
Completed by:		Date:	
Input by:		Date:	