

New Agent / CWeb Request Form

Dealer Rep Information			
Dealer Rep Name			
Dealership Name			
Office Address			
City, Province		Postal Code	
Office Phone		Fax	
Dealer Rep Number**	/	Email	
Admin Asst Phone			
Admin Asst Email			
Dealer Type	<input type="checkbox"/> Mutual Funds <input type="checkbox"/> Mortgages <input type="checkbox"/> EMD <input type="checkbox"/> Public Securities		

****The Dealer Rep number must be filled in if the client hold/plans to hold mutual funds.**

Administration (For CWT use)		
<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 sales representative notified		
<input type="checkbox"/> New agent set up on Excel file		
<input type="checkbox"/> Cweb login assigned and agent notified	Login	
	Password	
<input type="checkbox"/> Discussed transfer plan if applicable		
Completed by:	Date:	
Input by:	Date:	