fundserv

Introduction

Thank you for your inquiry about becoming a member of the Fundserv network. We appreciate your business. Before we can onboard your code, you must provide us with all the required information about your company and the services you intend to utilize.

Please complete all the enclosed forms, and have them signed by the appropriate officer of your company before returning them with the required setup fee to onboarding@fundserv.com.

To determine your setup fee, please refer to the Fundserv Fee information online at Become a Member page on the public website.

Checklist

Check off each of the forms as you fill them out, and keep track of them here:

- [ ] 1. Introduction
- [ ] 2. Customer Contract Form
- [ ] 3. Definitions Schedule
- [ ] 4. Designation of Code(s) Form
- [ ] 5. Designation of Third Party Form
- [ ] 6. Associate Member User Access Form
- [ ] 7. Company Contact(s) Information Form
- [ ] 8. Company Billing Contact Information Form
- [ ] 9. Data Protection Schedule

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Important Information Regarding These Forms

Using These Forms and E-Signature

Please download this PDF form to your computer and open in an Adobe/Acrobat application (not browser) in order to use the e-signature functionality.

Legal Documentation

Fundserv must have a valid contract with each of its members. No changes to the contract are permitted. Please ensure that the contract is executed by a signing officer previously identified during code registration.

User Access

To gain access to the Fundserv Connect portal, individual users must first be set up by Fundserv. The user will have access to API Standards, Standards, Guides, Forms & Videos and the Funnel on the Fundserv Connect portal.

Company Contact Information

To ensure Fundserv is contacting the appropriate people at your company during the testing process and afterwards, we require that you submit the Company Contact Information form prior to testing. This information will be kept confidential.

For additional information about Fundserv, please visit www.fundserv.com or contact us directly at onboarding@fundserv.com with any questions.

RESET

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