fundserv

Company Billing Contact Information Form

Please complete all required fields in this form and have it signed by the authorized signing officer(s) of your firm before returning it to onboarding@fundserv.com.

Provide us with the company billing contact(s) information in the section below to ensure that Fundserv directs monthly invoices to the appropriate individual(s)/department(s) within your organization.

Note: you may use a department or group email distribution for the Billing Contact; however, you must use an individual email address for access to the Billing Portal.

Company Code*	

Billing Contact

The Billing Contact will receive a monthly email notification when the electronic invoice from Fundserv is available on the Billing Portal. They may also receive communications from Fundserv's accounting team regarding the account.

Name*	Email*
Phone*	

Access to the Billing Portal (at least one user must be enrolled for this service)

The Billing Portal, which is accessed through the Fundserv Connect member portal, is where individuals from your company can view and download the monthly invoices generated by Fundserv. Please enter the names and email addresses of the individuals who will require access to the Billing Portal.

Name*	Email*
Name	Email
Name	Email
Name	Email

Signature*	Date*

* Required Field

RESET SEND