Download Application Kit.

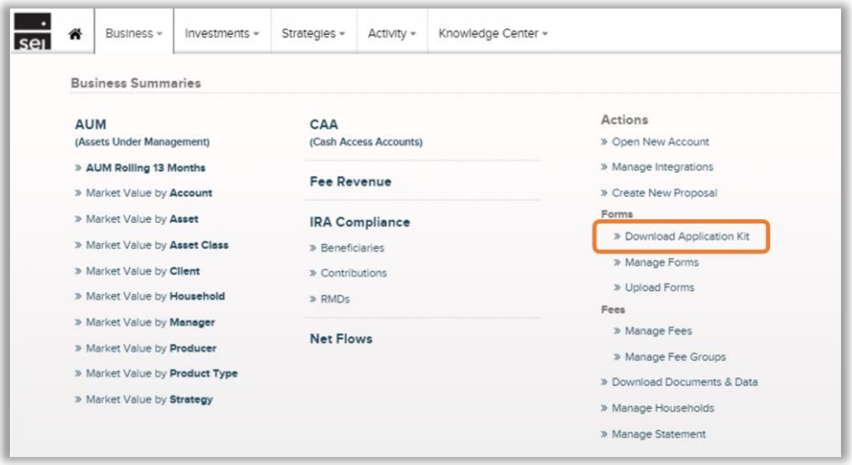
Use of Feature

Download Application Kit provides an easy way to generate blank account open forms. Kits can be customized to include only the firms you need for various account types.

Generate a **Preassigned Account Number** for tracking.

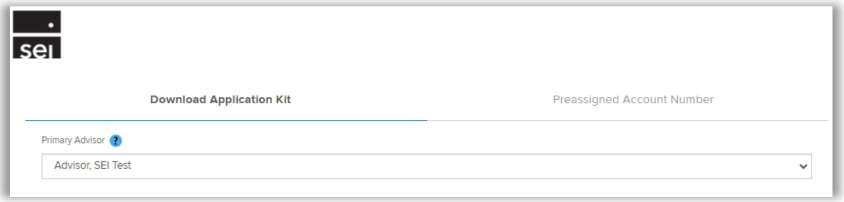
Navigating to Download Application Kit

From your home landing page, select the Business menu drop down. Under the Forms section select **Download Application Kit.**



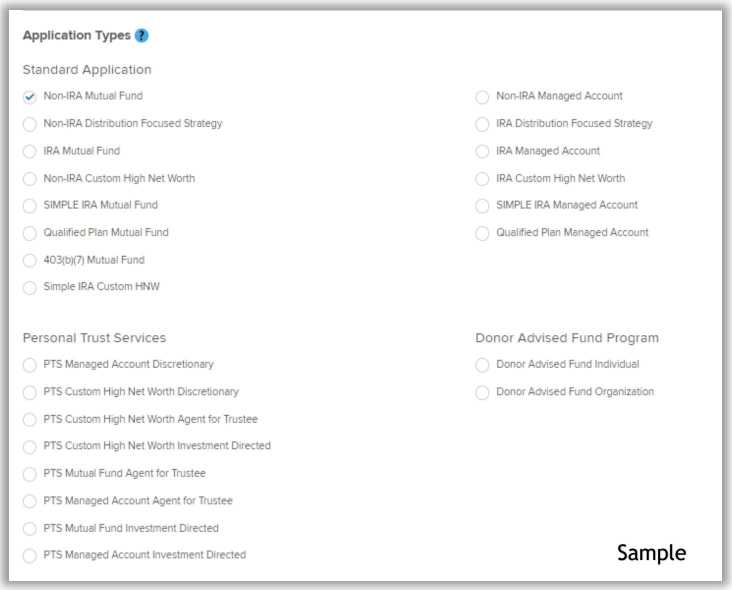
Download Application Kit

Select the **Primary Advisor** of the account. If applicable, additional advisors can be identified within the Advisor Information section on the application.



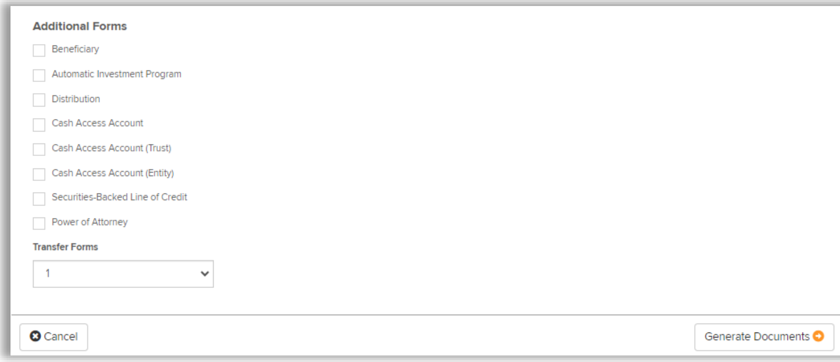
Select the **Application Type**. If you are unsure which application to choose please reach out to the SEI Service Team.

Application types will vary based on broker dealer approval and user entitlements.



Select **Additional Forms** you need to build your application kit. Options will vary based on application type.

You may select **Generate Documents** once you have selected an application.

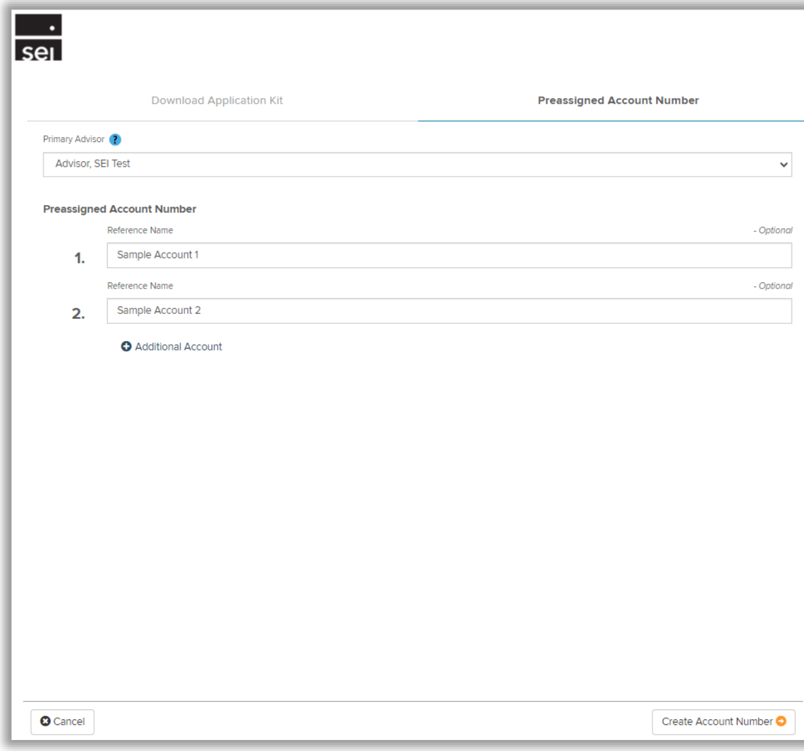


Preassigned Account Number

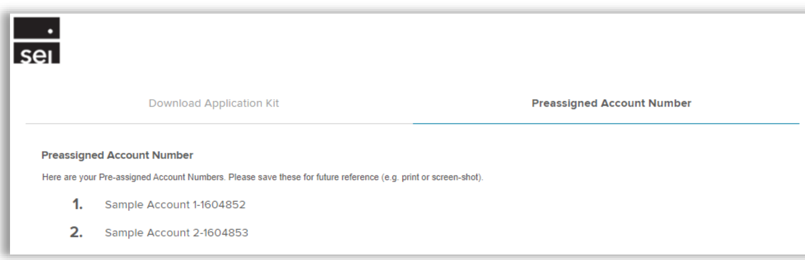
Select the **Primary Advisor** of the account. If applicable, additional advisors can be identified within the Advisor Information section on the application.

Creating a **Reference Name** will help you match the preassigned account number to a client account however the field is optional.

Select **+Additional Account** to create more preassigned account numbers.



Select **Create Account Number**. Save your preassigned account number(s) for future use. Be sure to add the preassigned account number to the forms in your application kit.

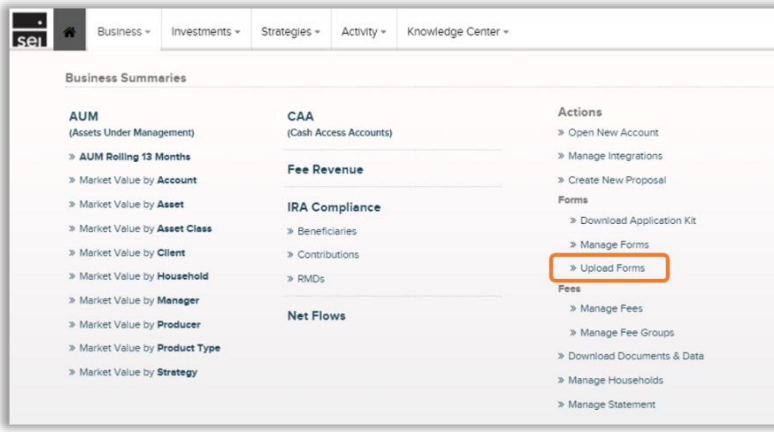


Upload to SEI

Once your account open kit has been signed by your client you can upload the packet to SEI for processing.

Navigating to Upload Forms

From your home landing page, select the Business menu drop down. Under the Forms section select **Upload Forms**.



Select Form Type & Upload Documents

The form type will default to **New Account**. Search the preassigned account number you created, you can search by the reference name or account number.

Drag and drop or browse to attach your application kit. Select **Upload**. Once the file has been uploaded select **Submit**.