

Form Automation Service Sign-up

and Form Automation Standard



Please complete this form in order to sign up for ETI's Forms Automation Service

This form is fully automated to ensure the best user experience and data accuracy when entering data or completing a form generated using ETI's Forms Library. All forms are 128-bit encrypted for protection.

Date _____

Automatic Date

Please tell us about your company...

Your Name

Phone Number

Company

Fax Number

Address

City

State

Zip

Email Address

Website

All fields on this form use ETI's standard settings.

Notice that if you type in more data than fits in a field, the font size automatically scales to fit.

What is your primary business? (please choose **ONLY** one)

☐

Mutual Fund

☐

Money Manager

☐

Insurance Company

☐

Broker/Dealer

☐

Other _____

Notice that you can only choose one check box - check boxes can be mutually exclusive.

Also notice that Other contains a list of choices - which can be edited or locked from editing.

How do you sell your products? (choose all that apply)

☐

Registered Reps

☐

Employees

☐

Online Marketing

☐

Direct Sales

☐

Other _____

Notice that you can choose as many check boxes as necessary.

By clicking on the PRINT button, the form can be validated and warn the rep about errors before printing.

By clicking the SUBMIT button, the data is output to a file, automatically sent to your web site or email address and that data can then be imported into your database without data entry.

Signature

Forms can be setup for electronic signatures for those reps who have an electronic signature pad.