



Take the Work Out Of Paperwork

# How To Request A Form Using Quik!

## Request A Form

If you need a form built that we don't currently have in our system, please send the form to us. In most cases, we will build the form for free within 10 business days, if not much sooner. To request a form, first download the form from your dealer's website and save it on your hard-drive. Second, open Quik! Forms Library, click on the Online menu and choose Request A Form. Your web browser will be launched and the Submit Form Or Dealer Request screen should appear (see below). Click on the **Send Form** link below.

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"Our goal is to make it easier for financial advisors to do business, and Quik! does just that!"

- Cheryl Dillon  
Quik! Co-Founder

### Submit Form Or Dealer Request

Help us serve you better... Can't find a form you want? Want a form built? Wish we were working with your dealer?

1 - Send us the form you want and we'll contact the dealer to automate the form for you.

[Send Form](#)

2 - We build custom forms. We can build your custom forms for only \$25 / page. (You must submit an **electronic copy** of your form.)

[Build Form](#)

3 - Request a dealer to be added to our list.

[Add Dealer](#)



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Next, the Send Us Your Form page will appear, enabling you to upload your file directly to our server.



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Address http://www.etiforms.com/submitformreq\_sendform.aspx

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## Send Us Your Form

There are three ways you can send a form that you would like built for the Quik! Forms Library...

### 1 - Upload Your Form Directly To Our Server:

To Upload: Browse for your file on your hard drive and then click the upload button. Max file size is 2 megabytes.)

Dealer Name

Please provide the dealer name for this form.

Form Name

Please name your form.

Form Description

Please describe your form.

Instructions

Do you have any specific instructions?

Uploading may take a few minutes, depending on the file size. Please be patient while the file uploads. (Please only click the Upload File button once.)

"When I signed up my first client and discovered that I had to fill out all the paperwork by hand, I knew there had to be a better way... that's why I developed Quik!"

- Richard Walker  
Quik! Co-Founder and  
Financial Planner

To upload your file, click the Browse button and select the file you wish to upload. Second, type in a dealer name (the company whose form you are sending), the form name (the name that describes the form, not the file name per se), a description of how the form should be used (e.g. "use this form to open a new account") and any instructions you wish us to have about this form. To complete the upload process, click the Upload File button.

You can repeat this process for each form you wish to send to us. Or, you can send an email to [forms@etiforms.com](mailto:forms@etiforms.com) with all of the files you would like built.

## Forms Policy

Our policy on building forms is to build almost any industry form for free when requested by a customer. However, we do charge for forms that are custom and specific to your operations, or are not in wide-spread use by the industry. Since we do cannot recover our cost by building the forms, we can expect to recover our costs when more than one user subscribes to the form.