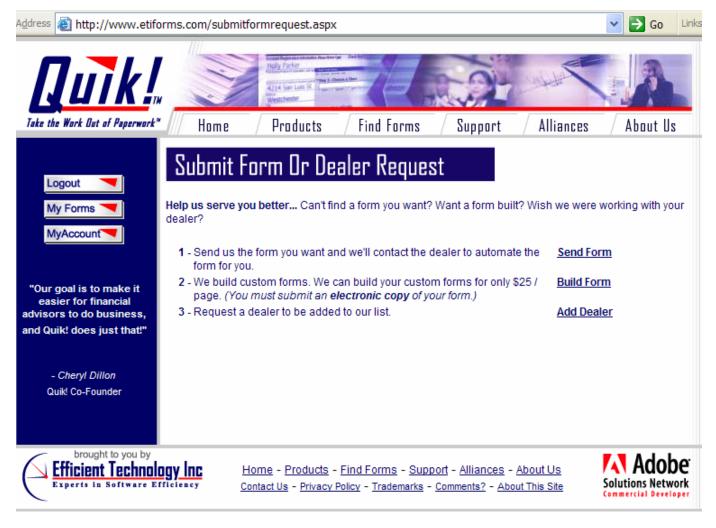


## **How To Request A Form Using Quik!**

## **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.



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



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Quik!					
Take the Work Out of Paperwork	* /// Home / Produ	cts / Find Forms	/ Support / Al	liances / About Us	
Logout My Forms MyAccount		an send a form that you		Quik! Forms Library Browse	
"When I signed up my first client and	Dealer Name		Please provid	le the dealer name for this	
discovered that I had to fill out all the paperwork	Form Name		Please name	your form.	
by hand, I knew there had to be a better way	Form Description		Please descri	be your form.	
that's why I developed Quik!"	Instructions Do yo		Do you have	ou have any specific instructions?	
- <i>Richard Walker</i> Quik! Co-Founder and Financial Planner	Uploading may take a few only click the Upload File		ile size. Please be patient wi	Upload File	

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 <u>forms@etiforms.com</u> 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.