

Security Administration Form – For International Accounts

Part 1 – User Information

Submit one form for each user.

Name	Organization name
Home address (or Birth date)	Title/job position
E-mail address	<input type="checkbox"/> Add <input type="checkbox"/> Modify <input type="checkbox"/> Remove (<i>skip to Part 3</i>)
Phone #	Account ID

Part 2 – Access to Application

By checking a box, you are representing to Wespath that the user identified in Part 1 is allowed to have access to all or part of the application.

Institutional Investor Portal (*check one*)

- Inquiry—permits users to view account balances, account allocations and to query the transaction history
- Transactional—permits users to initiate transactions, such as deposits or investment allocation changes
- Transactional Authorize—permits transactional security access and allows users to provide second-party signature verification for withdrawals

If you select “Transactional” or “Transactional Authorize,” you are indicating that an individual has the authority to perform financial transactions. At least one person at your organization must have “Transactional Authorize” access. The transactional authorize representative takes responsibility for the account and identifies those who may conduct business on behalf of the organization.

- This level of access should apply to only the account specified above.
- This level of access should apply to **all** accounts for which the user has access.

Part 3 – Authorization

Name of user (<i>please print</i>)
User signature (<i>to “Add” or “Modify”</i>)
Date
Approval by authorized representative (<i>please print</i>)
Signature
Date

Send completed form to the Wespath Support Team via e-mail at support@wespath.org.

Part 4 – Wespath Use Only

Client services manager	Date
Plan sponsor relations manager	Date
Service desk	Date

▶ Final Distribution

- Service Desk: File original (final) copies for follow up reviews/audits

