NetXSelect® Enrollment Form

www.natplan.com | 401 Wilshire Blvd | Suite 1100 | Santa Monica, CA | 90401

Name of Client (Primary)		
Date of Birth	Client's Mother's Maiden Name (**Required**)	SSN
Name of Representative		Rep Code
What would you like the login ID to be? Indicate in order of preference. (No more than 9 characters). 1st Preference:	2nd Preference:	3rd Preference:
☐ New ID ☐ Add another account to ID		Date

Check the preferred method of contact for login information:

☐ - NPC Business Helpdesk contacts client at following phone number: ________________________

☐ - Client contacts NPC Business Support Unit at (888) 607-2658

PLEASE FAX THIS COMPLETED FORM TO (888) 225-9757.

Please list each individual account you would like to enroll, including the code for the type of account and the name on the account. Once the account has been set up, the client's login ID and password can be obtained by contacting the NPC Business Support Unit. Please allow 24 – 48 hours for processing.

Account Number (Please list primary account first)	**Type of Account** (Use account codes listed below)	**Client Name on Account** (Print first initial and last name on account)

Account Category Codes

CLUB	Investment Club
COD	Receive / Deliver vs. Payment
CORP	Corporation
CPPS	Corporate Pension or Profit-Sharing Plan
CUST	Custodian
DLJC	DLJSC Retirement Account – Simple
DLJI	DLJSC Retirement Account
DKJP	DLJSC SEP Prototype and SARSEP
DLJQ	DLJSC Qualified Retirement Plan
DKJS	DLJSC Retirement Account SEP-IRA
ESTT	Estate
EXMP	Exempt Organization
FINL	Financial institution
GOVT	Government Entity/ Agency
GRDN	Guardian / Conservatorship
INDV	Individual
INVA	Investment Advisor / Managed Account
JNTN	Joint
KUST	Custom Profile
MISC	Miscellaneous (default category)
NPRO	Non-Profit Organization
PART	Partnership
RETE	Third Party as Custodian ERISA Account
RETI	Third Party as Custodian
SOLE	Sole Proprietorship
TODI	Transfer on Death (Individual)
TODJ	Transfer on Death (Joint)
TRST	Trust

All account holders must sign this form with the exception of minors. (If there is an authorized signer, please include backup documentation – i.e., POA)

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Client's Name Client's Signature

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Client's Name Client's Signature