



NEW SELLING AGREEMENT REQUEST FORM

Please submit to Operations@pcsb.net

Representative Name:	Date of Request:
Requested Company/Vendor Name:	
Type of Agreement Requested: <input type="checkbox"/> General Selling Agreement (Allows for all products offered by the vendor to be sold) <input type="checkbox"/> Service Only (Allows for accounts currently held with the vendor to be serviced but no additional sales made) <input type="checkbox"/> Special Request (Only specific Series, Fund(s), Class, etc... being requested) List below: <hr/>	
Do you currently have assets with this company/Vendor? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes: <input type="checkbox"/> Client <input type="checkbox"/> Prospect <input type="checkbox"/> Both Number of accounts/contracts: _____ Total Assets: _____	
If General Agreement or Special Request, please estimate amount of new business to be sold on an annual basis into the requested product(s). (Please estimate for each of the following): <input type="checkbox"/> New accounts / contracts: _____ <input type="checkbox"/> Total Assets: _____ <input type="checkbox"/> Total GDC: _____	
Requestor Comments:	
*Note: Regulatory guidelines demand proper due diligence of any product company/vendor before entering into any agreements, and once entered, ongoing and continuing scrutiny and oversight. Even though we want you to have the tools available to help with your success, we cannot guarantee that each request will be honored.	

Internal Use Only

<input type="checkbox"/> Approved <input type="checkbox"/> Declined	Agreement Type: <input type="checkbox"/> General <input type="checkbox"/> Service Only <input type="checkbox"/> Special
Agreement Signed: _____	Approved By: Ernest A. Sampson, CEO Signature: _____