



# CONTACT RECORD

Questions? Call 1-866-839-8376

**Instructions:** Complete this form to establish a new contact and/or EON User with the Pool.

**CONTACT TYPE:** (Please select a contact type.)

Contact Type: **Person** \*Individual to be established as a contact.  
**Group** \_\_\_\_\_ \*Group of individuals that can only be established as a Statement Recipient.  
(Group Name)

**CONTACT INFORMATION:** (Please fill this section out completely. If this contact is a group, please fill out the second line of this section only.)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Mr. Ms. Mrs.  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_ Ext. \_\_\_\_\_ Mobile: \_\_\_\_\_ Fax: \_\_\_\_\_

**TRUSTEE INFORMATION:** (If applicable, please enter the name of the Trustee.)

Trustee Name: \_\_\_\_\_

**EON USER INFORMATION:** (Please fill this section out completely.) \*Group contacts will not be permitted EON access.

Preferred/Current EON Username: \_\_\_\_\_ (Client Services will contact you if your preferred Username is unavailable.)

Please select and answer one of the security questions below. Your answer to the selected question will be required to reset your password.

- What is the name of your first pet?
- What was the color of your first car?
- In what city was your Mother born?
- What is the middle name of your oldest child?
- What is your Mother's maiden name?
- What is the name of the street you grew up on?
- What was your childhood nickname?

*\*Note: Your access to the Easy Online Network (EON) will be completed by the Client Services Group. You will receive an email from the EON Administrator (eonadministrator@pfm.com) confirming when your access is setup. The email will contain a temporary password for your initial login. You can login by visiting the TexasTERM website at [www.texasterm.net](http://www.texasterm.net). You will be prompted to change the temporary password after you login. If you have any questions, please contact the Client Services Group at 1-866-839-8376.*

Your answer: \_\_\_\_\_

**SIGNATURE:** (Please sign inside the box below for future verification purposes.)

Contact Signature

\_\_\_\_\_ Print or Type Name of Contact

\_\_\_\_\_ Date

*\*This form only establishes the individual or group above as a Contact in the records of the Pool. It does not give access to Investor accounts or establish a statement recipient. Please submit the TexasTERM Permissions Form to associate the Contact above to an Investor, assign permissions, and establish the individual or group as a statement recipient.*

**Any document received by email will not be accepted. Please send by fax or mail.**

<b>FAX TO:</b> TexasTERM Client Services Group 1-800-252-9551	<b>MAIL TO:</b> TexasTERM Client Services Group P.O. Box 11760 Harrisburg, PA 17108-1760
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POOL USE ONLY		
V2014.12	DATE	INITIALS
Processed		
Confirmed		