Information you need to create a QI/WP/WT system account

1 — **Determine Authorized Users**

Only the following authorized users can access the QI system:

- **Responsible Officer**
- **Contact Person**
- **Powers of Attorney** (optional, limit 2)

2 — **Obtain Contact Information for Authorized Users**

- **Last Name**
- **First Name**
- **Business Telephone Number**
- **Unique Email Address** that is different from the other authorized users. Using the same email as another account may cause the previous account to lose access.

NOTE: Last Name, First Name, and Email Address used when creating a user's account **must match exactly** what is entered in the entity account contact information for the roles above.

3 — **Gather Entity Information**

- FATCA ID (If entity has a FATCA Registration account)
- Entity Legal Name
- Is there a QI Agreement currently in place with IRS?
  - **Yes**, will need to **renew** agreement. Identify type Qualified Intermediary (QI), Withholding Foreign Partnership (WP), or Withholding Foreign Trust (WT)
  - **No**, will need to **apply** for QI, WP, or WT status. Select "Not Applicable" after entering entity name in New QI Account screen
- QI, WP, or WT EIN (if entity currently has QI, WP, or WT agreement)

4 — **Determine Login Credentials to QI System**

To access the QI system, **each authorized user** will need to create their own unique login credentials:

- **User Name**
- **Password**
- **Unique Email Address**
- **First Name**
- **Last Name**

5 — **Determine which Authorized User will Create the QI System Account**

Only **one authorized user** can create the QI system account.

The remaining authorized users can gain access to the QI system when their **Name** and **Email Address** in their QI Account setup **matches** the **Name** and **Email Address** of a Responsible Officer, Contact person, or Power of Attorney.

The Responsible Officer should sign and submit the final application or renewal request.