Only the following authorized users can access the QI system:

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

- 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.

- 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)*

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

- User Name
- Password
- Unique Email Address

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.