# How to Set-Up Pershing for Data Downloads in the System

## Step 1:

If you are a **registered representative of a Broker-Dealer**, you need to contact the Pershing Representative at the Broker-Dealer.

If you are an **Investment Advisor Representative of a RIA**, you need to contact your RIA firm to determine your Pershing Representative.

If you are the **owner of the RIA**, then you need to contact your Custodial Broker-Dealer Pershing Representative or contact Pershing directly to find your Pershing Representative.

## Step 2:

Through your Pershing Representative (could be with B/D) you need to request the **InfoDirect Enrollment Agreement for Pershing.** Your Pershing Representative will assist you in filling out the agreement. Return the form to the Pershing Representative.

Instructions while filling out Info Direct Enrollment form with Pershing Representatives - Please include the foloowing file types on the Info Direct Enrollment form: **DESC, ACCT/ACCF, GACT, FUND, ISA, ACTV, and GMON.** (Your Pershing Representative can make sure these are selected on the form).

## Step 3:

Within 1 week you will get your Username/Password for Pershing InfoDirect. When you receive the Username/Password, call (239) 325-1225. We will setup the Pershing Info Direct link in the system. Within 1-2 weeks your daily updating feed will be live to view in the system.