INDIVIDUAL FILE AUTOMATIC REPETITIVE STATEMENT ENTRY FORM

Do not write on this form. Photocopy this form and fill out the photocopy. Photocopy the completed photocopy for your records. Mail the completed photocopy with your other input.

Print the **DATE**, your **FIRM NUMBER** and the **FILE NUMBER**.

MO.		DA.		YR.	

FIRM # ______________ FILE # ______________

This feature allows up to one Fee and two Cost entries to automatically calculate and print on the file's statement each month until removed. If you want a Firm-Wide Automatic Repetitive Cost Charge to calculate and print on all of your client's statements, call Customer Service. Suppressing or re-instating the Firm-Wide Automatic Repetitive Cost Charge for an individual file does not affect the file's Individual Automatic Repetitive Statement entries.

IF THE ENTRY IS A MONTHLY **CHARGE**: print an "X" in the Charge Box or
IF THE ENTRY IS A MONTHLY **CREDIT**: print an "X" in the Credit Box.

TO AUTOMATICALLY POST A MONTHLY FEE OR COST WHICH IS CALCULATED AS A PERCENTAGE OF FEES BILLED: Fill out the percentage boxes and leave the amount boxes blank.

TO AUTOMATICALLY POST A MONTHLY FEE OR COST WHICH IS CALCULATED AS A PERCENTAGE OF FEES BILLED, **BUT WHICH IS NOT TO EXCEED A CERTAIN AMOUNT**: Fill out the percentage and amount boxes.

TO AUTOMATICALLY POST A MONTHLY FLAT FEE OR MONTHLY FLAT COST: Fill out only the amount.

DESCRIPTIONS: Each entry can be accompanied by a 65 character description. No codes can be used in the description. Only free-form description. Print one letter or puctuation mark per box. To make a space between words, leave one box empty.

REPLACING EXISTING AUTOMATIC ENTRIES: Every time you submit this form it will replace all pre-existing automatic entries for the file. If you want to retain those pre-existing entries and add another, you will have to re-submit the pre-existing entries along with the new entry.

TO REMOVE THE INDIVIDUAL FILE AUTOMATIC REPETITIVE STATEMENT ENTRIES FOR AN INDIVIDUAL FILE: Print an "X" in the remove box after the Number 4.

TO SUPPRESS THE FIRM-WIDE AUTOMATIC REPETITIVE COST CHARGE FOR AN INDIVIDUAL FILE: Print an "X" in the suppress box after the Number 5.

TO RE-INSTATE THE FIRM-WIDE AUTOMATIC REPETITIVE COST CHARGE FOR AN INDIVIDUAL FILE: Print an "X" in the re-instate box after the Number 6.

1. COST ENTRY: (Print an "X" in **one** of these two boxes: CHARGE ☐ or CREDIT ☐ entry.)

PERCENTAGE ☐☐.☐ % NOT TO EXCEED AMOUNT OR FLAT CHARGE $ ☐☐☐☐☐☐.☐☐

2. COST ENTRY: (Print an "X" in **one** of these two boxes: CHARGE ☐ or CREDIT ☐ entry.)

PERCENTAGE ☐☐.☐ % NOT TO EXCEED AMOUNT OR FLAT CHARGE $ ☐☐☐☐☐☐.☐☐

3. FEE ENTRY: (Print an "X" in **one** of these two boxes: CHARGE ☐ or CREDIT ☐ entry.)

PERCENTAGE ☐☐.☐ % NOT TO EXCEED AMOUNT OR FLAT CHARGE $ ☐☐☐☐☐☐.☐☐

4. ☐ * REMOVE THE INDIVIDUAL AUTOMATIC REPETITIVE STATEMENT ENTRIES FROM THIS FILE.
5. ☐ * SUPPRESS THE FIRM-WIDE AUTOMATIC REPETITIVE COST CHARGE ON THIS FILE.
6. ☐ * RE-INSTATE THE FIRM-WIDE AUTOMATIC REPETITIVE COST CHARGE FOR THIS FILE.