SAA Self-Entitlement Guide for E-Bill

FINRA's electronic billing system, E-Bill, enables firms to view and pay FINRA invoices as well as fund the FINRA Flex-Funding Account and FINRA Renewal Account. E-Bill enables a firm to authorize electronic payment directly from its designated bank account to the firm's FINRA Flex-Funding Account and FINRA Renewal Account.

Each firm's Super Account Administrator (SAA) has the ability to assign user access rights to E-Bill for themselves and employees at their respective firms. This guide provides step-by-step instructions for assigning access rights to SAA accounts for E-Bill.

Note to SAAs: Once you have assigned user rights to the E-Bill system for your own account, you will need to logout and then log in again to the Firm Gateway for your new user rights to take effect.

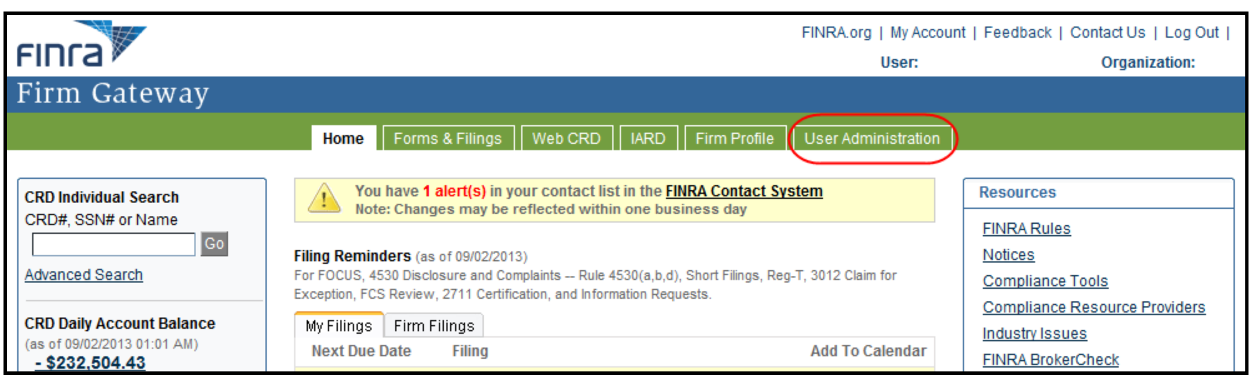
Visit the FINRA website for more information about the E-Bill system or the FINRA Entitlement Program.

Access Account Management:

Access via Firm Gateway at**:** https://firms.finra.org/; or
Access directly at: https://accountmgmt.finra.org/ ewsadmin2/index.jsp

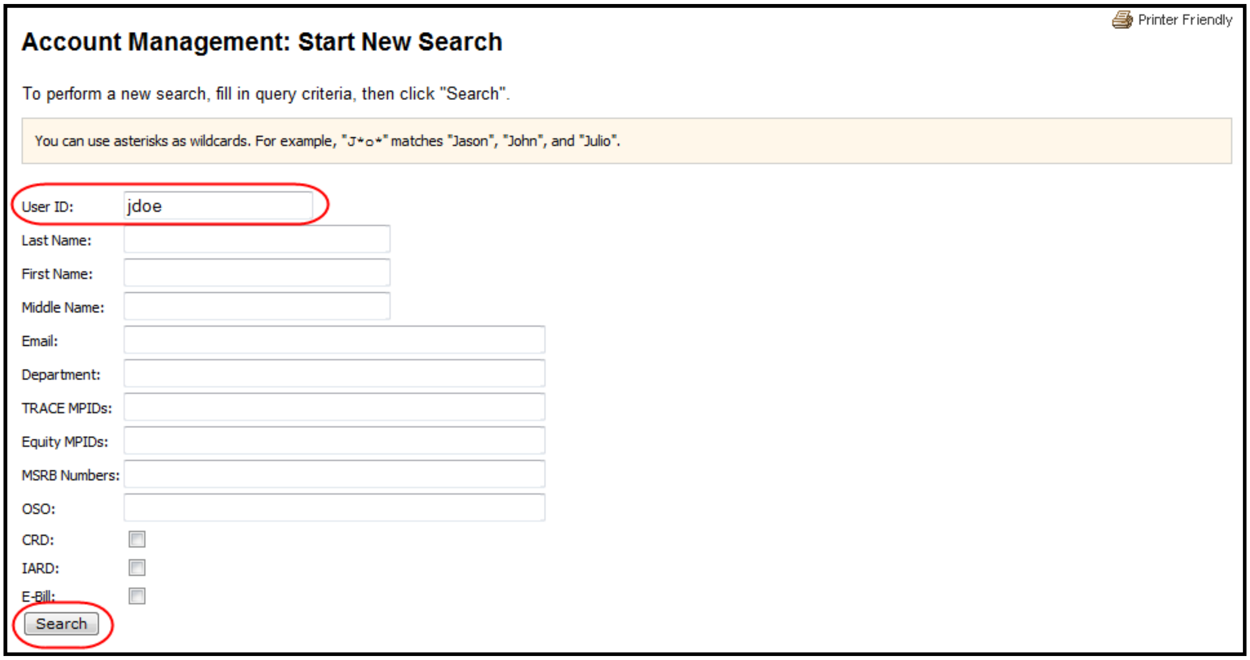
How to Assign User Privileges to an SAA Account for E-Bill

1. After logging into Firm Gateway, click on the **User Administration** tab.

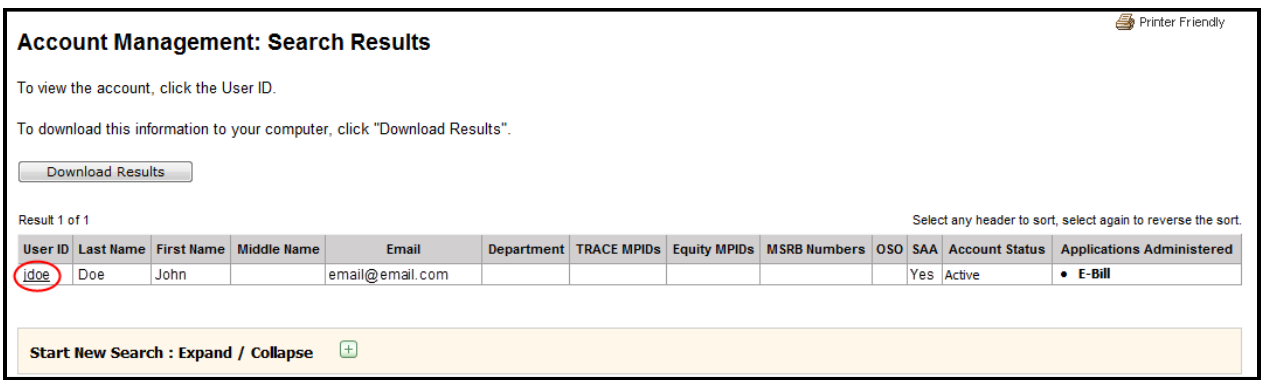


Questions on Account Management or E-Bill? Call the FINRA Call Center at **301-590-6500**
8 A.M. - 8 P.M., ET, Monday through Friday.

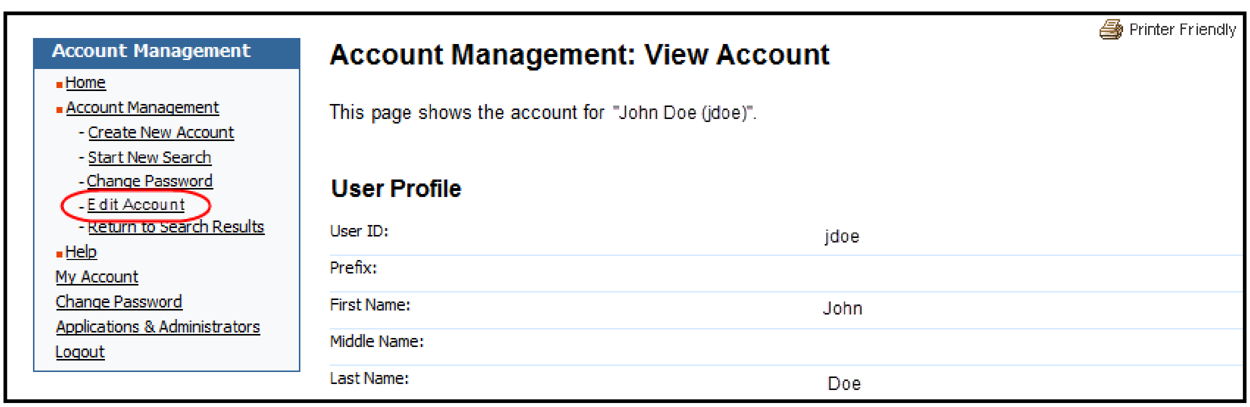
2. Enter your **User ID** or **Name** in the appropriate fields
3. Click the **Search** button located at the bottom of the screen.



4. Click on your **User ID** hyperlink.

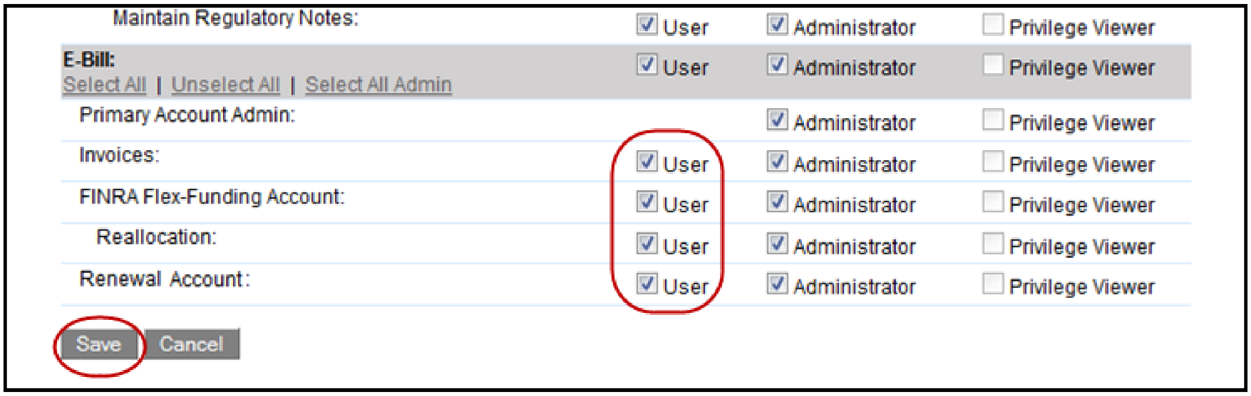


5. Click on **Edit Account** on the navigation bar located on the left side of the screen.



6. Scroll down the page to the Application Privileges section for E-Bill.
7. Select the **User** checkbox next to the desired entitlement privilege.
8. Click the **Save** button at the bottom of the screen.

In order for your new user system privileges to take effect you must logout and then log back in.



User Privilege	Description
Invoices	Grants access to view and pay invoices.
FINRA Flex-Funding Account	Grants access to view the FINRA Flex-Funding Account balance and fund the account by ACH payment.
Reallocation	Grants the ability to reallocate (transfer) funds from the FINRA Flex-Funding Account. With this privilege, reallocation can be used to pay invoices and fund the Renewal Account.
Renewal	Grants access to view the FINRA Renewal Account balance and annual Renewal Statement charges. Subject to entitlements, a user can pay the Renewal Statement charges by reallocating funds from the FINRA Flex-Funding Account or by ACH.