The branch review method allows regulators that participate in branch office registration to choose how to process branch closing/withdrawal requests submitted using Web CRD®.

The default termination review method for branches is Automatic, meaning that all branches requesting closing/withdrawal will be automatically terminated or withdrawn. Regulators have the option to change the termination review method for specific branches to Manual, meaning that closing/withdrawal requests receive a Termination Requested status or a Termination Requested-No Registration status and appear in the Branch Organization queue for review prior to termination.

**Changing a Branch Review Method:**


1. Click the CRD Main tab on the toolbar.
2. From the **Organization** section of the Web CRD Site Map, click the NFI Organization Search hyperlink.

**OR**

1. Click the **Organization** tab on the toolbar.
2. Click **Non-Filing Info** from the submenu.

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Questions on Web CRD? Call the Regulatory User Support Line at **240-386-4242**

9 A.M. through 5 P.M., ET, Monday-Friday.
3. Enter identifying information and click **Search** to perform a search.
4. Select a firm under **Primary Business Name**, and click the firm hyperlink.

5. Click **Branch Review Method** from the navigation panel.

6. Enter search criteria, or leave all fields blank to display all branches.
7. Click **Search**.
8. Click the **Branch CRD Number** hyperlink.
9. Select the **Manual** or **Automatic** radio button to update the branch termination review

10. Click **Save**.