Account Type – Please provide a list of all the account types used in the stock record the firm is submitting.

Each field in the template should be populated as follows:

firm_account_type – The code used in the stock record that maps to a specific account type used in the firm's books and records (e.g., cash, margin, short, etc.)

finra_account_type – Identify the FINRA account type that corresponds to the firm account type. Select from one of the following: "CASH", "MARGIN", or "N/A" (for all other accounts)

firm_account_type_description – The description that corresponds to the **firm_account_type.** This is optional.