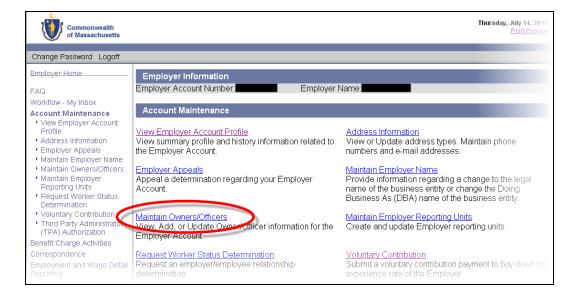
MAINTAIN OWNERS/OFFICERS

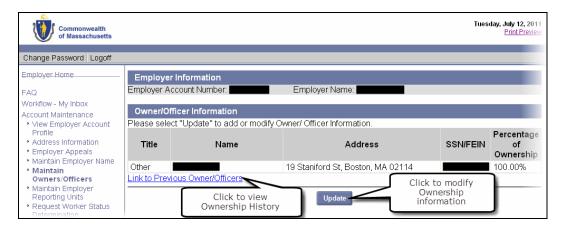
Introduction	This section describes how to view, add, and modify owner/officer information, and view ownership history.
Helpful Hints	 The combined ownership percentage of all owners on the account cannot exceed 100%.
	 It is not possible to add a second owner/officer when the business type is sole proprietorship.
	The owner can be an individual owner or a legally formed entity.
	Information on up to five owners can be added to an account.

Viewing Owner/Officer Information

- 1. Log in to QUEST and click Account Maintenance.
- 2. Click the Maintain Owner/Officers link.



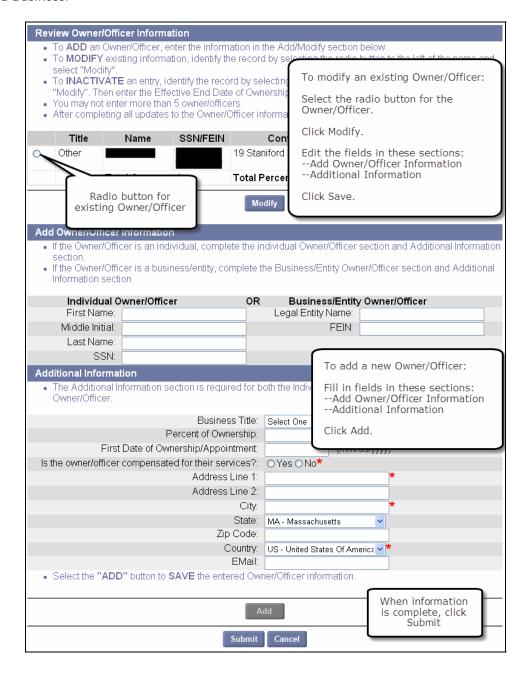
3. The Owner/Officer Information page appears.



Updating Owner/Officer Information

- 1. Display the **Owner/Officer Information** page using the instructions in the previous section.
- 2. Click Update.
- 3. The **Review Owner/Officer** page appears. Add, modify, or inactivate Owner/Officer entries using the instructions below.

NOTE: Owner/Officer information that is being updated due to the purchase or sale of a business must be changed by following the steps in the section, *Provide Information on the Purchase or Sale of a Business*.



To Add an Owner/Officer:

- 1. Perform the steps in *Updating Owner/Officer Information*.
- Enter the information into the fields in the Add/Modify Owner/Officer Information and Additional Information areas.
- 3. Click Add below the Additional Information area.
- 4. Repeat for each new Owner/Officer entry you want to add.

IMPORTANT NOTE: Information about an Owner/Officer in the Add/Modify Owner/Officer Information area should either go under Individual Owner/Officer (left column) or Business Entity Owner/Officer (right column). Do not put information in both columns.

To Modify Existing Owner/Officer Information:

- 1. Perform the steps in *Updating Owner/Officer Information*.
- 2. Select the radio button to the left of an entry.
- 3. Click Modify.
- 4. Edit the fields in the Add/Modify Owner/Officer Information and Additional Information areas.
- 5. Click Save below the Additional Information area.
- 6. Repeat for each existing Owner/Officer entry.

To Inactivate an Owner/Officer:

- 1. Perform the steps in *Updating Owner/Officer Information*.
- 2. Select the radio button to the left of that entry and click Modify.
- 3. Add a date to the Effective End Date of Ownership field.



4. Click Save.

Viewing Owner/Officer History

- 1. Log in to QUEST and click **Account Maintenance**.
- 2. Click the Maintain Owner/Officers link.
- 3. Click Link to Previous Owner/Officers.



4. The **Previous Owner/Officer Information** page appears. It is similar to the Owner/Officer Information page, but displays **Effective Begin Date** of Ownership and **Effective End Date** of Ownership.

