

Other Business

Overview/Policy

Additional information on positions of authority the individual may hold with other companies whether or not it is financial services should be disclosed in the Other Business section of the Individual (MU4) Form.

This section should be completed if the individual is currently engaged in any other business as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise.

Definitions and Charts

Not applicable

How To

Add Other Business:

1. From the Other Business section of the Individual (MU4) Form, click the **Add** button.
2. Complete all **required fields** for the Other Business.
3. Click the **Save** button.
4. Repeat Steps 1 through 3 if additional Other Business entries are needed.

Helpful Hints

1. If involvement in "Other Business Activities" on the **Identifying Information** section was answered "Yes", the Other Business section must be completed.

Additional Resources:

- Quick Guide:
 - [MU4 Filing Instructions](#)
 - [Amendments \(MU4\)](#)

[**See Individual Help Table of Contents**](#)