**Instructions**: Please complete this form and email it, along with the required information and documents, to [operations@hedgestar.com](mailto:operations@hedgestar.com).

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| --- | --- |
| **Required Information** | **Information/Notes** |
| Client/Project |  |
| Project # |  |
| Contact person, phone number and email  (Person HedgeStar should contact with requests for clarification or more information) |  |
| Contact information for billing person  (Person to whom the billing should be addressed) |  |
| Valuation as of date (month/day/year) |  |
| Required completion date (month/day/year)  (generally allow 3-5 business days) |  |
| **Required Documents\*** |  |
| Recent valuation statement if available from the swap counterparty (e.g. the bank or other financial institution) |  |
| Swap trade confirmation(s) signed by both parties including amortization schedule |  |
| Nature of business operations |  |
| Equity credit rating if available |  |

\* Mark as either N/A = Not Applicable or EM = Email Attached