

New Account in Series

Modify Existing Account

Select Account to Copy Data From

Clear Selected Account

## New Account

Blank form will be generated with a unique account number.

\* 'Select Account to Copy Data From' allows you to choose from an existing account for the agency and populate the information for easier completion \*

## Modify Existing

Select account you wish to modify from drop down. Form will be populated with the current information on file.

### Account Information

Agency Account #

Participant Name

Account Name

## Account Information

Agency Account # will be assigned upon creation.

Participant Name

Account Name for categorizing the account (General

Fund, Water and Sewer, etc.)

### Contact Information

Address

City

State

Zip

Code

Phone

Fax

## Contact Information

Any physical correspondence, like statements, will be sent to the address on file. Please ensure all information is up to date and deliverable!

### Banking Information

Check this box ONLY to make a change to the banking Wiring instructions

Banking Wiring Instructions

Beneficiary Bank Name

ABA/Routing Number

Beneficiary Bank Account Name

Account Number

Check this box ONLY if your bank is not on-line with the Federal Reserve and utilizes an intermediary bank for wires

Check this box ONLY if you plan to utilize, add, or change your ACH setup

Banking ACH Instructions (Complete if you plan to utilize ACH option)

Beneficiary Bank Name

ABA/Routing Number

Beneficiary Bank Account Name

Account Number

## Banking Information

All participants must provide either wiring or ACH instructions.  
\* If modifying an existing account, check the box to allow edits. \*

If you are making changes to banking instructions, you will receive a secondary confirmation from our accounting team upon processing.

A template is automatically created with this information. All requested funds will be delivered to the recorded banking details.

### Name of ALL Persons Authorized to Transmit/Withdraw Funds

Add Authorized User

Name	Email	New / Removed
Name: <input type="text"/>	Email: <input type="text"/>	<input type="button" value="Add Row"/> <input type="button" value="Cancel"/>

## Authorized Users

List all users that will be authorized to conduct transactions.  
Logins are based on participant email so please ensure they are entered correctly. \*NO group emails permitted. Must be individual emails for each user\*

At least one authorized user required.

### Name of ALL Persons with View Only Website Privilege

*Users here have full access to the website but may NOT conduct business*

Add View Only User

Name	Email	New / Removed
Name: <input type="text"/>	Email: <input type="text"/>	<input type="button" value="Add Row"/> <input type="button" value="Cancel"/>

## View Only Users

These users only have access to pull statements.

Optional; does not require an entry.

### Name, Title, Email and Signature of Persons Authorized to Notify the SBA of Changes in Account Information

Add Account Admin User

Name	Title	Email	New / Removed
Name: <input type="text"/>	Title: <input type="text"/>	Email: <input type="text"/>	<input type="button" value="Add Row"/> <input type="button" value="Cancel"/>

## Authorized Signers

At least one authorized signer required.

Updates to an account where all previous signers are no longer with the agency must assign a new signer that is in compliance with the resolution on file.

\* Signers must provide wet signature for every account update. \*

Number of Authorizing Signatures Required to Change Account Information.

Select the number below ▾

## Number of Authorized Signers

Choose between one or two signatures required to make a change.

Preview PDF

Retain Data For Later

Complete Form and Generate PDF for Mailing

## Preview

Preview option is found at the top of the page and allows the user to see a generated form to review before creating a final version.

\* Please note that this version of the form will not be accepted for processing \*

## Retain Data For Later

Retaining allows participant who made the edits, to save the form and return before submitting.

## Complete & Generate

Generate a completed form for submission, including the disclosure statement. These will need to be printed, signed, notarized, and mailed to the SBA for processing.



Florida State Board of Administration  
Attention: PRIME OPERATIONS  
1801 Hermitage Blvd, Suite 100  
Tallahassee, FL 32308

Once the form is generated, all wet signatures/notary are captured, and disclosure completed, please have the forms mailed to the SBA for processing!

Instructions

New Account in Series

Florida PRIME PAMF Page Instructions.



Contact us at 850-488-7311 or [PrimeOPS@sbafla.com](mailto:PrimeOPS@sbafla.com)



Full instructions are always available at the top of the form. If you have any questions during the process, please feel free to contact us.



# Florida PRIME Participant Account Maintenance Form

(One form must be completed for each agency account)

## Submitted Forms

No Submissions Found

[Instructions](#)

[New Account in Series](#)

[Modify Existing Account](#)

[Preview PDF](#)

## Saved Entries

No Saved Entries found.

Select Account to Copy Data From

[Clear Selected Account](#)

### Account Information

Agency Account #

Participant Name

Account Name

### Contact Information

Address

City  State  Zip Code

Phone  Fax

### Banking Information

Check this box ONLY to make a change to the banking Wiring instructions

#### Banking Wiring Instructions

Beneficiary Bank Name  ABA/Routing Number

Beneficiary Bank Account Name  Account Number

Check this box ONLY if your bank is not on-line with the Federal Reserve and utilizes an intermediary bank for wires

Check this box ONLY if you plan to utilize, add, or change your ACH setup

#### Banking ACH Instructions (Complete if you plan to utilize ACH option)

Beneficiary Bank Name  ABA/Routing Number

Beneficiary Bank Account Name  Account Number

### Name of ALL Persons Authorized to Transmit/Withdraw Funds

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Name	Email	New / Removed
<hr/>		

### Name of ALL Persons with View Only Website Privilege

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[Add View Only User](#)

Name	Email	New / Removed
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### Name, Title, Email and Signature of Persons Authorized to Notify the SBA of Changes in Account Information

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Number of Authorizing Signatures Required to Change Account Information.

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