



## Laser App Instructions

### To Access Fidelity RIA Forms

- First email forms@laserapp.com and request access
- You must provide them with a G# (Fidelity's Advisor Identification Number), if you currently do not have a G#, please contact us so we may provide you with this information.
- Laser app will then grant access to these forms

### Once you receive access, you can download Potomac Fund Management and Custodial forms

First, go to Utilities/ Install & Update Forms, expand the tree to find the forms you want to install, check the box to the left of the form(s), and click 'Install Selected Forms'

- Potomac Forms: Go to 'Securities\Potomac Fund Management'
- Fidelity Forms: Go to 'RIA\Fidelity RIA'
- Security Benefit Forms: Go to 'Annuities\Security Benefit Group\Advisor Designs Investment Advisor Authorization'
- Nationwide Forms: Go to 'Annuities\Nationwide\Investments Advisor Election Form- APO-5118'
- Jefferson National Forms: Contact us.
- 403(b) Forms: Contact us.

### Troubleshooting

- If you do not see the 'RIA' or 'Securities' trees, you can add them by going to Utilities/ Program Settings. Under the 'Program and Form Updates Tab', click on the button 'Select Form Channels.' Make sure to check off 'RIA' and 'Securities.'

### View Forms

- To begin viewing and filling out forms select the menu option 'Forms'
- Please note that Potomac forms are located under Forms/ Securities/ Potomac Fund Management (This is where you can find the PFM Investment Management Agreement. *Every new account requires this form.*)

### Updating Forms

- Make sure your Laser App program is set up to automatically update forms.
- Go to Utilities/ Program Settings. Under the 'Program and Form Updates Tab', make sure the option for 'Automatically check for updates' is selected.

**If you have any trouble, please contact us at 888-768-6622 / info@potomacfund.com**