

Buy an Equity	Buy a Mutual Fund	Trading a bond, certificate of deposit or other non-equity or mutual fund
<p>Click on Trade Request at the top of the web page, select Open Trade Request. Then follow the various drop-down boxes to input a trade.</p> <ul style="list-style-type: none"> • Select Portfolio: Principal • Select Type of Request: Buy • Asset ID: Input ticker or CUSIP or use the Look Up icon  • Asset Type: Equity <p>In Request Details:</p> <ul style="list-style-type: none"> • Input Shares • Order Type: Market or Limit • If the trade is a limit order you need to input a price and today's date in the next two drop down-boxes • Limit orders are good for day only • Complete Requestor Details • Click on Submit at the bottom of the page <p>The system will perform some validations. Warning boxes may pop-up and require action.</p> <p>Next you will see a “Verify Request Details” pop-up. If everything is correct, click on Confirm Request. If you need to edit the trade, click on Edit Request.</p>	<p>Click on Trade Request at the top of the web page, select Open Trade Request. Then follow the various drop-down boxes to input a trade.</p> <ul style="list-style-type: none"> • Select Portfolio: Principal • Select Type of Request: Buy • Asset ID: Input ticker or CUSIP or use the Look Up icon  • Asset Type: Mutual Fund <p>In Request Details:</p> <ul style="list-style-type: none"> • Input dollar amount to buy • Complete Requestor Details • Click on Submit at the bottom of the page <p>The system will perform some validations. Warning boxes may pop-up and require action.</p> <p>Next you will see a “Verify Request Details” pop-up. If everything is correct, click on Confirm Request. If you need to edit the trade, click on Edit Request.</p> <p>Mutual Fund trades input after 2:00 p.m. Eastern Time are done on a best-efforts basis.</p>	<p>You must call the directed trade line at 574.235.2941 for all trades other than equities and mutual funds. Specific details of the security will be needed for 1st Source to complete these transactions on your behalf.</p>

Sell an Equity

Click on **Trade Request** at the top of the web page, select **Open Trade Request**. Then follow the various drop-down boxes to input a trade.

- Select Portfolio: Principal
- Select Type of Request: Sell
- Asset ID: Input ticker or CUSIP or use the Look Up icon 
- Asset Type: Equity

In Request Details:

- Input Shares
- Order Type: Market or Limit
- If the trade is a limit order you need to input a price and today's date in the next two drop down boxes
- Limit orders are good for day only
- Complete Requestor Details
- Click on Submit at the bottom of the page

The system will perform some validations. Warning boxes may pop-up and require action.

Next you will see a **“Verify Request Details”** pop-up. If everything is correct, click on Confirm Request. If you need to edit the trade, click on Edit Request.

Sell a Mutual Fund

Click on **Trade Request** at the top of the web page, select **Open Trade Request**. Then follow the various drop-down boxes to input a trade.

- Select Portfolio: Principal
- Select Type of Request: Sell
- Asset ID: Input ticker or CUSIP or use the Look Up icon 
- Asset Type: Mutual Fund

In Request Details:

- Select Units or Dollars to trade in
- Amount: input unit or dollars depending on your selection above
- Trade Date: select date for execution
- Complete Requestor Details
- Click on Submit at the bottom of the page

The system will perform some validations. Warning boxes may pop-up and require action.

Next you will see a **“Verify Request Details”** pop-up. If everything is correct, click on Confirm Request. If you need to edit the trade, click on Edit Request.

Mutual Fund trades input after 2:00 p.m. Eastern Time are done on a best-efforts basis.

Reviewing Trade Status

After verifying your trade you will receive a reference number and the option to review the status of the trade by selecting “click here” on the page.

You will also have the option to make another trade request.

Trade Issues

If you experience a delay in the execution of a trade, contact the trade line at **574.235.2941**.

If you are purchasing a security that is not found in our system there will be a delay in execution due to setting up the security. Please provide as much information as possible to ensure the security is set up properly.