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## Complete Your Enrollment

We need some information to verify your business and complete your enrollment. This complies with the USA Patriot Act and is similar to opening a business checking account.

- Full legal name and business address
- US Tax ID number
- Social Security number for person who will administer the account

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## Verify with Bank

PEX will send your account information to our banking partner to verify and approve.

In the unlikely event we cannot verify your business from the information provided, we may ask for some additional info.

PEX verifies every business to protect against fraud.

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## Login for the First Time

PEX will email you login credentials and instructions.

After you login, you may order up to 10 cards right away, begin configuring your account with groups, and adding daily spending limits to cards or spending rules.

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## Fund Your Account

There are three ways to fund your PEX account:

- Bank-initiated ACH transfer
- Bank-initiated Wire transfer
- Free PEX ACH Service

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## Start Using PEX!

Once you fund your PEX account, you're free to start spending, give PEX Cards to employees or departments, and manage their spending from the PEX Admin Site.