

How to get your REP ID Number through DST

The following is a way to get the Rep ID Number for a management company. This information is required when you request to have accounts linked in OneView.

In order to map a missing account in OneView, you will need to provide the **Rep Id associated to the account** you would like mapped. In many cases, the management company will assign their own Rep Id number. This information can be found on a statement or directly from the product sponsor company. Further, you may also be asked for a **DST Account Number** (account number for reporting to Albridge) for just one account with that product sponsor company.

Go to: www.dstvision.com enter your Vision ID and Password and Sign In

From here you have several ways to access this information.

On the Home Page in the center is the [Management Company](#) and [Value](#) information.

- Pick a [Management Company](#) and click on the name
- This will bring up a list called the **Mgmt Co Asset Summary** page
- Scroll down until you see a fund with assets then click on [Accounts](#)
- This will bring up the **Accounts** information page. Click on [Details](#)
- This will bring up the **Account Overview** information for this client. In the center of the page is an area titled **Dealer of Record**. Under this information is a variety of information including the Dealer #/Branch # & Rep/Advisor #

Dealer of Record
Name:
Dealer #/Branch #:
Rep/Advisor Name:
Rep/Advisor #:
NSCC Firm #/Agent:
Capital Gains:
Dividends:
Date Established:
Last Maintenance:
Matrix Level:
BIN:
Name Search Code:
ROA #:
Letter of Intent #: