

How to change fees and rates for customer accounts

Periodically, we like to remind partners of our published cutoff dates for submitted changes to fees and rates for customer accounts. As a reminder, partners must submit a Rate/Fee Change Form via the online form in The Learning Center. Remember that an authorized signature is only needed if a fee or rate is increasing.



Please note that requests received before the published cutoff date will be updated that same month and will be applied to that entire month. Requests received after the published cutoff date will be updated the following month.

For your convenience, we have outlined the 2024 cutoff dates below.

2024 Cutoff Dates (by 2:30 p.m. ET)

January 24

February 22

March 22

April 23

May 23

June 21

July 24

August 23

September 23

October 24

November 21

December 20