

SEF Onboarding

CME Group Onboarding for SEFs and Bunched Orders

SEF Account Setups

- **CDS ONLY:** Complete [CME API Onboarding form](#)
- Request accounts to be set up at a SEF through your FCM
- Your FCM will utilize the CME Platform file
 - File contains the Account Number, Alias, Entity Name, AM Name, and Short Code
- Your FCM will send the account setup request to the SEF, copying the CME Onboarding team, and will provide all of the relevant account details

Bunched Order Accounts

Three options to setting up a bunched order:

- Use an existing FCM account
- Use an existing Customer account
- Create a new customer account that is labeled – “Asset Manager on behalf its clients”
 - If setting up a new customer account, you will need to register the account with the OTC registration team and provide the LEI of the parent company. Once the holding account is registered, your FCM will need to create the production account per the normal onboarding process.

Next Steps: SEF Readiness Checklist

- ☐ **Credit ONLY:** Complete [CME API onboarding form](#)
- ☐ Contact your Clearing Member to confirm timeline to access designated SEFs
- ☐ Complete required documentation for each SEF
- ☐ Speak with your FCM to receive confirmation that this link has been established with FCM, CME and the designated SEF
- ☐ Execute a cleared trade on all SEFs you will be utilizing
- ☐ Suggested other steps:
 - ☐ Utilize CME Group's Advanced SEF Solutions
 - ☐ Bunched Orders
 - Use an existing FCM account
 - Use an existing Customer account
 - Create a new customer account that is labeled – “Asset Manager on behalf its clients”
 - ☐ Order Grouping *(Not yet available)*
 - ☐ Multiple Order Submission *(Not yet available)*