

USERGUIDE

# Bloomberg Legal Entity Identifier (LEI)

A guide for setting up and renewing  
your LEI with Bloomberg



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# 1. LEI overview

## 1.1 Introduction

Legal Entity Identifier (LEI) is a 20-character, alphanumeric code based on the ISO 17442 standard developed by the ISO, and it is endorsed by the G20. It connects to key reference information that enables a clear and unique identification of legal entities.

## 1.2 Which entities can register for an LEI?

An LEI can be requested for all parties in a financial transaction including but not limited to:

- Registered Companies including Registered Subsidiaries
- Funds/Trusts
- Non Profit/Charity Organizations
- Government Bodies and Organizations
- Sole Proprietors (Individuals that appear in their local register)
- Branch offices (Main HQ entity must already have an LEI)

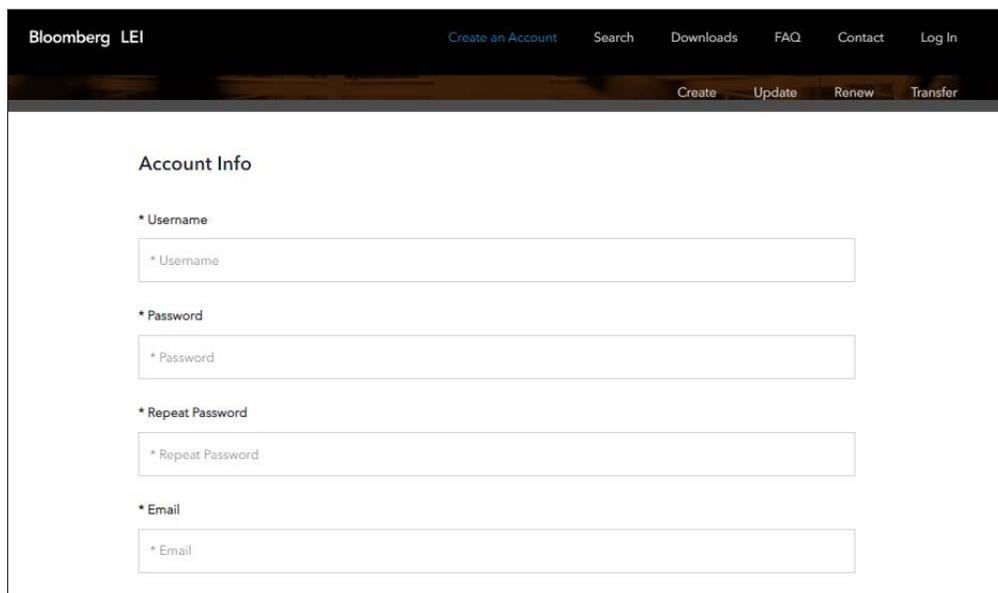
An LEI should NOT be requested for individuals or operating divisions. These entities should utilize the LEI of their parent organization.

## 1.3 Who can register my entity for an LEI?

LEI can be applied by the legal entity itself or can be requested by a third party. A self or third party LEI authorization form must be submitted during the LEI registration process.

## 1.4 Account/login setup

- To create a new account, click the "Create an Account" tab at the top right hand corner.
- Complete all required fields (\*), read and agree to the Terms of Service and Privacy Policy, check the check box in the form, then click on the "Sign Up" button.
- After clicking the "Sign Up" button, you will be directed to the login page and you will receive an email verifying your account creation, as shown on the next page.
- To log in, enter account credentials and click Log in button.
- A Two-Factor Login Code (confirmation code) will be sent to the requested email address.
- Enter the confirmation code in the Two Factor Code box and proceed with logging into your account. At this point, you are logged in and a secondary ribbon should appear containing various action items as seen below.



The screenshot shows the Bloomberg LEI website interface. At the top, there is a dark navigation bar with the text "Bloomberg LEI" on the left and several links: "Create an Account", "Search", "Downloads", "FAQ", "Contact", and "Log In". Below this, a secondary ribbon contains the buttons "Create", "Update", "Renew", and "Transfer". The main content area is titled "Account Info" and contains four required input fields, each with an asterisk and a label: "\* Username", "\* Password", "\* Repeat Password", and "\* Email". Each field is a simple text box with the label text inside.

#### 1.4.1 Updating profile

After logging in, you can review your profile or update any details there by going to the account and my profile tab. You can amend details including the contact name, company name, contact phone number or address.

#### 1.4.2 Adding and removing emails

An LEI account can be linked to up to 10 email addresses. You may use the same username and login with any of these emails and the same password.

To add or update any emails, you can click on the "account" button on the main ribbon and further click on "my profile" from the drop-down menu.

If any of the users have forgotten the password, they can always reset the password.

#### 1.4.3 Adding and removing payment card details

A credit card will need to be stored in the payment profile page before setting up the auto renewal. To add the card details, you can click on the "account" button on the main ribbon, and then click on "my profile" and "payment" tab.

You can manually add a card there. Or if you have successfully created or renewed an LEI before, the card details will also be saved in this payment page.

#### 1.4.4 Submission tracking and invoices

If you would like to check the submission status, you can click on the "account" button on the main ribbon and click on "my request". The tracking number and status will be shown in this page. If you have successfully created an LEI or renewed an LEI earlier, you will also find the invoice shown in the "invoice" column. Feel free to download this pdf file.

## 2. New LEI registration

### 2.1 General rules

There are 2 different ways to register for an LEI, via the web form or bulk Excel upload. The Excel template is typically used for submitting multiple records simultaneously.

To be considered for bulk pricing, a minimum of 10 records must be submitted per submission. The maximum amount of records permitted is 250 per bulk submission. (Therefore, in a scenario where you have 255 records to submit be sure to distribute the requests so that both files include at least 10 records).

### 2.2 Web form submission

Client can submit an application via the web form.

Please see the detailed steps outlined below:

- Step 1:** To create a new LEI, click the "Create" tab on the LEI Toolbar.
- Step 2:** You will be prompted with the option of requesting a new LEI using either a web form or a downloadable Excel template.
- Step 3:** Complete all required fields (\*) in the form, including checking the Service Customer Agreement box at the bottom of the page. Additionally, you will have the option of adding supporting documentation in the file tab, by clicking into or dropping a file in the provided box as seen on the next page. You may also save your progress as a draft using the "Save Draft" button.

What should be filled into the different section:

**General:** Legal Name, Entity Category, Legal Jurisdiction Country, Registration Authority, Legal Form, Entity creation date.

**Addresses:** Legal and Headquarter addresses.

**Relationships:** Direct and Ultimate parent details (For funds, user must fill in the details of the fund management entity (or Umbrella/ Feeder Fund) details.

**Entity events:** If there are any

**Contact information:** Contact name, company, phone.

**Files:** Reference documents to show the entity general information and authorization form. The authorization form can be downloaded from the FAQ session.

### 2.3 Bulk Excel workbook submission

Users may submit their LEI requests through a bulk format by using the Excel workbook provided by Bloomberg LEI. This option, along with the standard web form, will be available when beginning the registration or update process. To be considered for bulk pricing, a minimum of 10 records must be submitted per submission. The maximum amount of records permitted is 250 per bulk submission. (Therefore, in a scenario where you have 255 records to submit be sure to distribute the requests so that both files include at least 10 records).

Click the "Download Excel Workbook Template" button as seen below and populate information accordingly using the Basic Sample as a guide if needed. Once the file has been filled out, save it to your local PC and upload it to the site by either clicking into the Upload box and selecting the file or dragging the file into the box.

After clicking Upload Workbook, you will be taken to a second page to review and publish the entered payload data. Each row in the excel file will be represented by a unique payload. Any supporting documentation referenced in the Excel template should be uploaded here using the upload box. Once you have reviewed the payload data, the submission can be published by agreeing to the Service Customer Agreement and clicking the Publish button.

#### Download LEI Workbook.

Add submissions to the Excel Workbook by completing the required fields on each row. Compatible with Microsoft Excel 2007 or later versions.

**Use the reference data for certain fields.**

For *Country, Region, Authority ID, and Entity Legal Form Code*, please refer to the "Reference Sheet" below. Please look up your field and use the data inside "Value" column.

- [Download Country/Region Reference Sheet](#) 
- [Download Authority ID Reference Sheet](#) 
- [Download Entity Legal Form Code Reference Sheet](#) 

**Blank Template**

[Excel Workbook Template](#) 

## 2.4 Shopping cart and payment form

If you have multiple LEIs to submit, you can use shopping carts to submit them altogether. After using the web form to submit the entity details, you can select the option of "Add to cart" to add this item into a shopping cart. After adding all your LEIs into the cart, you can proceed to the "Cart" session at the toggle bar and checkout all of them together.

### Payment

After submitting the Web Form or the Excel Workbook, you will be prompted for payment. You are to complete all required fields (\*) of the form, using ASCII characters only. Taxation is determined based on the country of the domicile address. Once you have submitted your payment information using the Finalize Order button, the payment details will be authorized and stored alongside the registration data previously submitted. Please note your credit card will NOT be charged until the submission is renewed and approved by our analysts. Clients will see a charge on their credit card, but it is merely a hold until the submission is completed. your credit card will not be charged until the submission is completed. Clients will see a charge on their credit card, but it is merely a hold until the submission is completed.

The website will auto populate previously submitted payment details upon subsequent visits.

### Payment Form

[← Go Back](#) 1. LEI Details 2. Payment Details

Please finish the payment before you submit another LEI request, otherwise your current submission data will be cleared.

<h4>Payment Information</h4> <p><a href="#">Collapse ▾</a></p> <p>* Payment Method</p> <input type="text" value="Select a Payment Method"/> <p><input type="checkbox"/> Auto renew 30 days before next expiry. LEIs under this submission will auto renew every year. We will charge the card or payment method selected here.</p>	<h4>Price Information</h4> <p>New LEI for my company</p> <p><b>Base Price:</b> \$65.00 USD <b>Quantity:</b> 1</p> <hr/> <p>* <b>Tax:</b> \$0.00 USD</p> <hr/> <p>** <b>Est. Total:</b> \$65.00 USD</p>
<h4>Company Information and Domicile Address</h4> <p><a href="#">Collapse ▾</a></p> <p>This address is used to calculate the taxes for your purchase, and will also be used on the invoice. Please note that once an invoice is issued, it cannot be changed with updated or new information.</p> <p>Are you <input checked="" type="radio"/> an entrepreneur/business <input type="radio"/> or government body, other public entity <input type="radio"/> or private individual?</p> <p>* Company</p> <input type="text" value="Company Name"/> <p><small>Please enter a valid company name in your domicile address.</small></p>	<p><a href="#">Finalize Order</a></p>

# 3. LEI renewals

## 3.1 General rules

Renewals utilize the same bulk form and web form submission templates as creating and updating records. Renewals require payments and are expected annually.

## 3.2 Manual renewal (web form submission)

User can renew the LEI manually by visiting the LEI portal and submit the request once a year.

### Procedure

- Step 1:** To renew a new LEI, click the "Renew" tab on the LEI Toolbar.
- Step 2:** You will be prompted with the option of accessing the web form or using a downloadable Excel template, choose the web form and click on the LEI number.
- Step 3:** Review all pre-populated data fields (\*) in the form, including checking the Service Customer Agreement box at the bottom of the page. Additionally, you will have the option of adding supporting documentation in the file tab if you have updated any entity data. Our team will verify the data based on supporting document and publicly available data.

There are 6 different tabs in the form and users will need to go over all of them and edit the data accordingly. We have added a new field of "Entity Creation date" field in the general tab and it is now a mandatory field.

- Step 4:** Upload supporting documents which state the name, registry ID, entity creation date and addresses if they are available.

**Renew LEI Application**

1. LEI Details 2. Payment Details

To renew a single LEI, click the Checkout button on the right side of the page. On successful completion you will receive a tracking number. You can check the status of your submission on the My Requests tab. To save a draft of your submission, click on the Save Draft button.

General ● Addresses ● Relationships ● Entity Events ● Contact Information ● Files ●

Reference Files Collapse ▾

Select or drop reference documents here.

Total attachment size limit 12 MB and accept .pdf,.xlsx,.xls,.csv,.doc,.docx.

Please use the above section to upload any reference documents related to your submission.  
(This may include items such as the entity's certificate of incorporation, or a corporate filing)

I have read and agree to the [Service Customer Agreement](#). Further, I understand that I may be required to provide certified documentation confirming my authorization on behalf of the legal entity if requested by Bloomberg Finance LP.

Checkout Add To Cart Save Draft

### 3.3 Manual renewal (bulk excel submission)

Users may renew multiple LEIs through a bulk format by using the Excel workbook provided by Bloomberg LEI. To be considered for bulk discounted pricing, a minimum of 10 records must be submitted per submission. The maximum number of records permitted is 250 per bulk submission. (Therefore, in a scenario where you have 255 records to submit be sure to distribute the requests so that both files include at least 10 records).

#### Procedure

- Step 1:** Click the “Renew” tab on the LEI Toolbar.
- Step 2:** You will be prompted with the option of accessing the web form or using a downloadable Excel template, choose the “Excel Workbook”
- Step 3:** Copy the LEI number in the “export your LEI to excel workbook: drop box
- Step 4:** Review all pre-populated data fields (\*) in the excel workbook, prepare a supporting document, and add the file name to the last column CT with the name of Reference
- Step 5:** After clicking Upload Workbook, you will be taken to a second page to review and publish the entered payload data. Each row in the excel file will be represented by a unique payload.
- Step 6:** Any supporting documentation referenced in the Excel template should be uploaded here using the upload box.

#### Renew LEI Application

1. Provide Submission Data 2. Review and Publish 3. Payment Details

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#### Download LEI Workbook.

Add submissions to the Excel Workbook by completing the required fields on each row. Compatible with Microsoft Excel 2007 or later versions.

**Use the reference data for certain fields.**  
For Country, Region, Authority ID, and Entity Legal Form Code, please refer to the "Reference Sheet" below. Please look up your field and use the data inside "Value" column.

- [Download Country/Region Reference Sheet](#) 
- [Download Authority ID Reference Sheet](#) 
- [Download Entity Legal Form Code Reference Sheet](#) 

**Blank Template**

[Excel Workbook Template](#) 

**From My Requests Page**

You can also export an LEI to an Excel Workbook by following these steps:

1. [Go to My Requests](#)
2. Click on LEIs tab to view the LEIs you would like to update or renew.
3. Click on Download link under Actions column.



# 4. LEI transfer

## 4.1 Transferring an LEI to Bloomberg

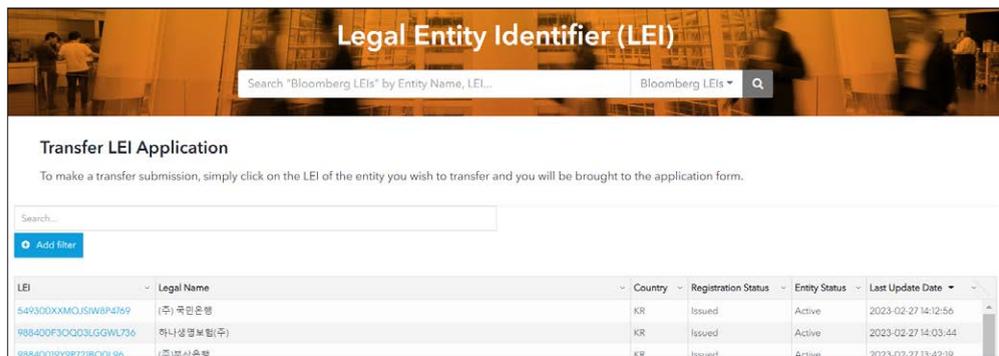
Users may request that management of their existing LEI record(s) currently registered with another LOU be transferred to Bloomberg. This request can be submitted on the Transfer tab. While the identifier itself will not change, the ongoing maintenance and administration of the LEI will be transferred. There is no fee to transfer unless the current registration status of your LEI is Lapsed. In this case you will be charged a renewal fee at the time of transfer. Bloomberg must rely on the action of the other LOU in order to complete the whole transfer process. Therefore, the process might take longer.

## 4.2 Transfer-in procedure (web form submission)

To transfer fewer than 10 LEI number, you can use our web form to submit your transfer request.

### Procedure

- Step 1:** Click on the "Transfer" button in the LEI toolbar.
- Step 2:** You will be prompted with the option of accessing the Web form or using a downloadable Excel Workbook.
- Step 3** If you already have your single LEI that you would like to transfer, you can click on the web form button and just copy the number in the search bar.
- Step 4:** Click on the LEI number and review the data in the form. Please upload supporting document in the files if you have updated any entity data.
- Step 5:** Please choose either "transfer and renew" or "only transfer my LEI". If your LEI is currently lapsed or will be lapse in 10 days, you will be prompted for payment details to renew the LEI.



### 4.2.1 Transfer-in procedure (bulk submission)

To transfer 10 or more than 10 LEI, you are recommended to use our excel workbook to make the transfer request.

#### Procedure

- Step 1:** Click on the "Transfer" button in the LEI toolbar.
- Step 2:** Then, please choose the excel workbook option.
- Step 3:** Copy the LEI number in the "export your LEI to excel workbook: drop box and export the file.
- Step 4:** Review the data in the excel workbook and add the supporting document name in the last column with the name of reference if you have updated any entity data. We require a supporting document like the business registration document which shows the updated information.
- Step 5:** Please choose either "transfer and renew" or "only transfer my LEI". If your LEI is currently lapsed or will be lapse in 10 days, you will be prompted for payment details to renew the LEI.

### Download LEI Workbook.

Add submissions to the Excel Workbook by completing the required fields on each row. Compatible with Microsoft Excel 2007 or later versions.

**Use the reference data for certain fields.**  
For *Country, Region, Authority ID, and Entity Legal Form Code*, please refer to the "Reference Sheet" below. Please look up your field and use the data inside "Value" column.

- [Download Country/Region Reference Sheet](#) 
- [Download Authority ID Reference Sheet](#) 
- [Download Entity Legal Form Code Reference Sheet](#) 

**Blank Template**  
[Excel Workbook Template](#) 

**Export your LEI(s) to Excel Workbook**  
You can find your LEIs in Additional LEIs tab in the search page. Input your LEIs below, one LEI per line, no space or comma, and you will be able to export the associated reference data into excel. At this time you may only provide 250 LEIs.

[Export 0 Items \(max: 250\)](#)

### 4.3 LEI partner of Bloomberg

Bloomberg provides single and bulk LEI Registration for you. If your firm would like to register for more than 250 LEIs, we also offer customized solution and become a LEI partner of Bloomberg. The customized solution allows you to obtain your LEI faster and easier. Please contact us at lei-support@bloomberg.net if you are interested.

## 5. LEI update

### 5.1 Updating your LEI records - general guidance

Updating records can be done for individual records and in bulk using the web form or excel template described above. It is important to note that updates do not require payment. Throughout a given registration period (LEI Registration status is Issued), you are free to update your LEI as often as you would like. Typical examples of updates are in response to corporate actions of your company such as a name change, a location change, or a change in incorporation state. Generally, you cannot submit an update if your record is in LAPSED registration state. If your LEI is LAPSED, you would need to renew it first in order to make an update.

### 5.2 Update procedure (web form submission)

To make an update with your LEI, you can either come to our "Web Form" or "Excel Workbook" page where you can see your LEIs. The following steps share how you can update the record by using the my requests function. Or if you have the LEI number, you can copy and paste the number in the box next to "Web Form" selection and you will be directed to the same web form.

#### Procedure

- Step 1:** Click on the "Update" button in the LEI toolbar.
- Step 2:** You will be prompted with the option of accessing the My requests, Web form or using a downloadable Excel Workbook.
- Step 3:** If you choose the my request option, you will then need to go to click on the second tab of "LEI" to view the whole list of LEIs managed by you.
- Step 4:** You can click on "update" in the Item Actions column and review the data in the web form.
- Step 5:** If you have updated any entity data in the web form, data in the entity events will need to be filled. Please update the event type, effective date and select the type of validation documents.
- Step 6:** Please upload a supporting document which shows the updated data. For example, if you have updated the name of the entity, please provide a business registration document or change of name document.

### Update LEI Application

1. LEI Details 2. Payment Details

To update a single LEI, click the Submit button on the right side of the page. On successful completion you will receive a tracking number. You can check the status of your submission on the My Requests tab. To save a draft of your submission, click on the Save Draft button.

Renew this LEI

General ● Addresses ● Relationships ● Entity Events ● Contact Information ● Files ●

\*Entity Category ⓘ  
GENERAL

\*Legal Jurisdiction Country ⓘ  
UNITED STATES

Legal Jurisdiction Region ⓘ  
Ohio (US-OH)

\*Legal Name (Local Language) ⓘ  
Weston Inc.

Next: Addresses

I have read and agree to the [Service Customer Agreement](#). Further, I understand that I may be required to provide certified documentation confirming my authorization on behalf of the legal entity if requested by Bloomberg Finance LP.

Submit Add To Cart Save Draft

### 5.3 Update procedure (bulk submission)

To update 10 or more than 10 LEIs, you are recommended to use our excel workbook to make the update request.

#### Procedure

- Step 1:** Click on the "Update" button in the LEI toolbar.
- Step 2:** Then, please choose the excel workbook option.
- Step 3:** Copy the LEI number in the "export your LEI to excel workbook" drop box and export the file.
- Step 4:** Update the data in the excel workbook and add the supporting document name in the last column with the name of reference if you have updated any entity data. If the document name is abc.pdf, please include the whole name with the file format. (.pdf in this case) We require a supporting document like the business registration document which shows the updated information.
- Step 5:** Upload the supporting document in the "Files" tab.

#### Update LEI Application

1. Provide Submission Data | 2. Review and Publish | 3. Confirmation

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#### Download LEI Workbook.

Add submissions to the Excel Workbook by completing the required fields on each row. Compatible with Microsoft Excel 2007 or later versions.

**Use the reference data for certain fields.**  
For *Country, Region, Authority ID, and Entity Legal Form Code*, please refer to the "Reference Sheet" below. Please look up your field and use the data inside "Value" column.

- [Download Country/Region Reference Sheet](#) 
- [Download Authority ID Reference Sheet](#) 
- [Download Entity Legal Form Code Reference Sheet](#) 

**Blank Template**

[Excel Workbook Template](#) 

**From My Requests Page**

You can also export an *LEI* to an Excel Workbook by following these steps:

1. Go to [My Requests](#)
2. Click on LEIs tab to view the LEIs you would like to update or renew.
3. Click on Download link under Actions column.

## 6. Frequently asked questions

### 6.1 LEI ownership transfer

If you would like to change an LEI account owner to another, you can assess the “Transfer Ownership” tab. It can be assessed by clicking on the drop-down under the “Account” button on the Toggle Bar and then click on my requests. For a single ownership transfer, you can provide the LEI an destination username.

To continue the transfer process, click the “Add” button. This will auto-populate the entry under “Confirm your Transfers” section. Then click the “Submit” button to finalize the transfer.

To transfer a list of LEIs to another account, you can use the bulk ownership transfer feature. Please provide a .csv file with the following headers, in order: LEI, Destination Username, Destination email (Optional). Then hit the “Upload” button, to auto-populate the entry under “Confirm your Transfers” section. Then click the “Submit” button to finalize the transfer.

If you cannot access the original account, you will need to email a copy of the signed self or third party authorization form, the LEI and destination username details to our support team. (lei-support@bloomberg.net) The authorization form can be downloaded in the FAQ and reference documents session.

### 6.2 Forgot your password

The password can be modified any time if you have forgotten it. Please click on Login at the Toggle bar and come to the “forgot password? Reset it here” page. A 2 factor login code will be sent to your email associated with the user account.

### 6.3 Technical errors

If you encountered any data service error during the login process, please try to change your browser to chrome, delete cookies and clear cache.

If the problem still persists, please reach out to the support team by submitting a feedback item.

### 6.4 Other FAQ

For further questions, please check our FAQ page. <https://lei.bloomberg.com/docs/faq#>

# About the Bloomberg Terminal.

Since 1981, business and financial professionals have depended on the Bloomberg Terminal® for the real-time data, news and analytics they need to make the decisions that matter. The Terminal provides information on every asset class — from fixed income to equities, foreign exchange to commodities, derivatives to mortgages — all seamlessly integrated with on-demand multimedia content, extensive electronic-trading capabilities and a superior communications network.



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## Take the next step.

For additional information,  
press the <HELP> key twice  
on the Bloomberg Terminal®.

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