



Kingdom Trust Update API Documentation

The purpose of this REST API is to provide firms with an efficient and secure method for updating their onboarding Customer Account information. Currently we are only testing this API.

Outline

- Authentication Credentials
- JSON Outline
- Field Name / Value Pair Options (Requirements)
- Sample JSON string
- Sample Postman cURL
- Legal

Authentication Credentials	Requirements
Testing URL with Version	https://kt-api-test.clearstratus.com:443/api/UpdateAccountV1R0
apikey Test	Temp key will be issued for Testing.
Static IP Address	Required for Testing

JSON Outline		
Primary Account Data	One Record Per Account	ALL Fields Required
	middle_name, address2	Required – provide “None” if blank
	For the first time a customer is sent, the account_number field needs to show “new”. Subsequent submissions of that same customer require the same account_number sent in that was received for first submission.	Required
Beneficiary	Multiple Records Per Primary Account Possible	Optional to provide – if provided then all fields are Required.
Interested Party	Multiple Records Per Primary Account Possible	Optional to provide - if provided then all fields are Required.
ADR	Multiple Records Per Primary Account Possible	Optional to provide - if provided then all fields are Required.

Requirements

Field Name / Description	Field Value / Requirements - Do not provide what is within ()
account_id	(Your systems customer account ID. Since this is a returning customer, send back same number you sent the first time.)
account_number	Since you are updating the same customer’s account again, it is required that the account_number that was sent back upon the initial purchase of that customer’s new account type be resent back on any subsequent update API submittals. Examples of account_numbers sent back: "account_number": " TKJ0000209",

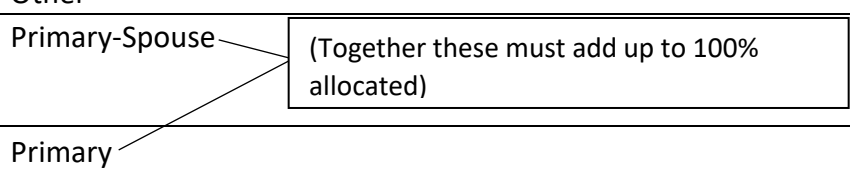
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API Name: UpdateAccountV1R0

API Version: V1R0

API Document Version: V3

	"account_number": "RGM0000061", "account_number": "PDS0000007")
us_citizen	Yes (must be a US citizen to open account)
account_type	ITradIRA (Individual Traditional IRA type account)
	IRothIRA (Individual Roth IRA type account)
	ISEPIRA (Individual SEP IRA type account)
	ISolo (Individual Solo 401(k) type account)
	ISimple (Individual Simple type account)
	ICustodial (Individual Custodial type account)
married_status	Married
	UnMarried
id_type	State DL
	State ID
	Passport
id_issued_date	YYYY-MM-DD (Date it was issued)
Id_expired_date	YYYY-MM-DD (Date it expires)
id_score	(Scoring value from Affiliate's Customer Authentication Process)
transaction_type	Domestic
	International
	Both
type_of_investment	stocks, bonds, mutual funds, etc.
	other alternative investments
	private lending/promissory notes
	private equity
	private hedge funds
	single-member LLC
	precious metals
	crowdfunding
	marketplace lending
	perth mint
	cryptocurrency and digital assets
signature_agreement	I agree
state	(Upper case two letter - 50 states)
zip	(5 digits)

country	United States
phone	(10 digits with hyphens)
email	(Must include @, ., and 2 or 3 letter top-level domain “.com”, etc.)
birth_month	(Two digits)
birth_day	(Two digits)
birth_year	(Four digits)
Social	(9 digits without hyphens) (When a Test account, use “000000000” or “999999999”. Do not use real SSNs when Testing.)
[Beneficiary] social or Don't know SSN flag	(Provide beneficiary's social for example “123456789” and “None” for the SSN flag OR provide the don't know it SSN flag as “Yes” and provide “00000000” for the social field. Do not use real SSNs when Testing.)
[Beneficiary] relationship	Spouse
	Parent
	Child
	Other
[Beneficiary] type	Primary-Spouse  <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-left: 20px;"> (Together these must add up to 100% allocated) </div>
	Primary
	Contingent (must add up to 100% allocated)
[Beneficiary] percent_allocated	(Must add up to 100 percent for each beneficiary type - no “%” symbols and no decimals)
[Beneficiary] first_name, middle_name, and last_name or EntityName	(Provide first, middle, and last name OR provide an Entity name when “Other” is chosen as the relationship). None (Provide “None” when leaving blank)
[Beneficiary] address2	None (Provide “None” when leaving blank)
[Beneficiary] country	United States
[Interested Party] country	United States
[ADR] country	United States

- Please note that if you are married, list your spouse as the first beneficiary person and choose “Spouse” for your relationship and “Primary-Spouse” as your beneficiary type. If you do not, your spouse will be required to sign later.
- When you send in a **Test** account, use a SSN like “000000000” or “999999999”. Same for other numbers like Driver’s License numbers use fake examples like “DR123456”. Do not use real Social Security Numbers or other sensitive information when Testing.

Update an Account with Kingdom Trust (Example #1 key plus data)

Testing URL: <https://kt-api-test.clearstratus.com:443/api/UpdateAccountV1R0>

Header:

apikey: (provide test key): 13431817c0df4224a37117b794a96xyz (Example Only)

Content-Type : application/json

Body:

```
{
  "account_id": "1199",
  "account_number": "PDS0000007",
  "account_type": "ITradIRA",
  "first_name": "Joe",
  "middle_name": "Bert",
  "last_name": "Smith",
  "address1": "Pine Street",
  "address2": "PO Box 101",
  "city": "Murray",
  "state": "KY",
  "zip": "42701",
  "country": "United States",
  "phone": "123-456-7890",
  "email": "joesmith@smithemail.com",
  "married_status": "Married",
  "birth_month": "01",
  "birth_day": "30",
```

```
"birth_year": "1965",
"social": "123456789",
"id_type": "State DL",
"id_number": "DR123456",
"id_state": "KY",
"id_issued_date": "2016-11-20",
"id_expired_date": "2021-12-27",
"id_score": "99",
"occupation": "Doctor",
"transaction_type": "Domestic",
"type_of_investment": "stocks, bonds, mutual funds, etc.",
"signature_agreement": "I agree",
"us_citizen": "Yes",
"beneficiary": [
  {"relationship": "Spouse",
    "first_name": "Betty",
    "middle_name": "None",
    "last_name": "Smith",
    "address1": "Pine Street",
    "address2": "PO Box 101",
    "city": "Murray",
    "state": "KY",
    "zip": "42701",
    "country": "United States",
    "phone": "123-456-7890",
    "birth_month": "01",
    "birth_day": "30",
    "birth_year": "1965",
    "social": "123456788",
    "percent_allocated": "60",
    "type": "Primary-Spouse",
    "SSNflag": "None",
    "EntityName": "None"},
  {"relationship": "Child",
    "first_name": "Joey",
    "middle_name": "Paul",
    "last_name": "Smith",
    "address1": "Pine Street",
    "address2": " PO Box 101",
```

```
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"phone": "123-456-7890",
"birth_month": "03",
"birth_day": "10",
"birth_year": "2004",
"social": "987654321",
"percent_allocated": "40",
"type": "Primary",
"SSNflag": "None",
"EntityName": "None"},
{"relationship": "Other",
"first_name": "None",
"middle_name": "None",
"last_name": "None",
"address1": "123 Ave South",
"address2": "None",
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"phone": "123-456-7999",
"birth_month": "11",
"birth_day": "20",
"birth_year": "1990",
"social": "000000000",
"percent_allocated": "100",
"type": "Contingent",
"SSNflag": "Yes",
"EntityName": "First Land Sales Inc"}],
"interested_party": [
{"first_name": "Jane",
"middle_name": "Lane",
"last_name": "Doe",
"address1": "Maple Street",
"address2": "PO Box 23",
"city": "Murray",
```

```
"state": "KY",
"zip": "42701",
"country": "United States",
"email": "Jane@bogusemail.com",
"phone": "123-456-7890"}],
"adr": [
{"first_name": "Phillip",
"middle_name": "M",
"last_name": "Turner",
"address1": "Oak Street",
"address2": "PO Box 11",
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"email": "PTurner@adremail.com",
"phone": "123-456-7890",
"fax": "222-444-5555"}]
}
```

Update an Account with Kingdom Trust (Example #2 key plus data but no beneficiary or Interested Party persons included)

Testing URL: <https://kt-api-test.clearstratus.com:443/api/UpdateAccountV1R0>

Header:

apikey (provide test key): 13431817c0df4224a37117b794a96xyz (Example Only)

Content-Type : application/json

Body:

```
{
"account_id": "149T7A4",
"account_number": "RGM0000061",
"account_type": "ISolo",
"first_name": "John",
"middle_name": "Paul",
"last_name": "Doe",
"address1": "Cone Street",
```

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```
"address2": "PO Box 0",
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"phone": "123-456-7890",
"email": "johndoe@doemail.org",
"married_status": "UnMarried",
"birth_month": "05",
"birth_day": "21",
"birth_year": "2000",
"social": "987654321",
"id_type": "Passport",
"id_number": "123456ABC",
"id_state": "KY",
"id_issued_date": "2017-02-06",
"id_expired_date": "2022-07-05",
"id_score": "80",
"occupation": "Teacher",
"transaction_type": "Both",
"type_of_investment": "precious metals",
"signature_agreement": "I agree",
"us_citizen": "Yes",
"adr": [
  {"first_name": "Noname",
    "last_name": "Smith",
    "address1": "Maple Street",
    "city": "Murray",
    "state": "KY",
    "zip": "42701",
    "country": "United States",
    "email": "NSmith@adremail.org",
    "phone": "123-456-7890",
    "fax": "222-444-5555"}]
}
```

API Response Examples

Success Reply (200) Success

```
{  
  "success": true,  
  "account_holder": "1199 Joe Bert Smith",  
  "account_number": "TJK0000209"  
}
```

Bad Request (400) Error

```
{  
  "Message": "The request is invalid.",  
  "ModelState": {  
    "apiModel.account_type": [  
      "The account_type field is required."  
    ]  
  }  
}
```

Bad Credentials (403) Forbidden

```
{  
  "message": "Invalid authentication credentials"  
}
```

OR

```
{  
  "Cannot create a new account here, only update accounts. Supply account number of account  
  to change."  
}
```

OR

```
{  
  "message": "Invalid Account Number"  
}
```

Bad Request (404) NotFound

```
{  
  "account_number": "ABC1234567",  
}
```

```
"message": "There is no returning account number for this number. Must send the exact
account_number that you sent in before for this account holder."
}
```

Bad Request (500) Error

```
{
  "message": "Bad Request"
}
```

Postman cURL Example #3

```
curl -X POST \
Testing https://kt-api-test.clearstratus.com:443/api/UpdateAccountV1R0\
-H 'apikey (provide test key): 13431817c0df4224a37117b794a96xyz' \
-H 'cache-control: no-cache' \
-H 'content-type: application/json' \
-H 'postman-token: 46ce4b2f-e8a0-1be4-d480-48a70a788622' \
-d '{
  "account_id": "1199",
  "account_number": "TKJ0000209",
  "account_type": "IRothIRA",
  "first_name": "Joe",
  "middle_name": "Bert",
  "last_name": "Smith",
  "address1": "Pine Street",
  "address2": "PO Box 101",
  "city": "Murray",
  "state": "KY",
  "zip": "42701",
  "country": "United States",
  "phone": "123-456-7890",
  "email": "joesmith@smithemail.com",
  "married_status": "Married",
  "birth_month": "01",
  "birth_day": "30",
  "birth_year": "1965",
  "social": "123456789",
}
```

```
"id_type": "State DL",
"id_number": "DR123456",
"id_state": "KY",
"id_issued_date": "2014-06-21",
"id_expired_date": "2020-04-03",
"id_score": "99",
"occupation": "Doctor",
"transaction_type": "Domestic",
"type_of_investment": "stocks, bonds, mutual funds, etc.",
"signature_agreement": "I agree",
"us_citizen": "Yes",
"beneficiary": [
{"relationship": "Spouse",
"first_name": "Betty",
"middle_name": "Jane",
"last_name": "Smith",
"address1": "Pine Street",
"address2": "PO Box 101",
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"phone": "123-456-7890",
"birth_month": "01",
"birth_day": "30",
"birth_year": "1965",
"social": "123456788",
"percent_allocated": "60",
"type": "Primary - Spouse",
"SSNflag": "None",
"EntityName": "None"},
{"relationship": "Child",
"first_name": "Sue",
"middle_name": "May",
"last_name": "Smith",
"address1": "Pine Street",
"address2": "PO Box 101",
"city": "Murray",
"state": "KY",
```

```
"zip": "42701",
"country": "United States",
"phone": "123-456-7890",
"birth_month": "01",
"birth_day": "30",
"birth_year": "1991",
"social": "000000000",
"percent_allocated": "40",
"type": "Primary",
"SSNflag": "Yes",
"EntityName": "None"}],
"interested_party": [
{"first_name": "Jane",
"middle_name": "Lane",
"last_name": "Doe",
"address1": "Maple Street",
"address2": "PO Box 23",
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"email": "Jane@bogusemail.com",
"phone": "123-456-7890"}],
"adr": [
{"first_name": "Phillip",
"middle_name": "M",
"last_name": "Turner",
"address1": "Oak Street",
"address2": "PO Box 11",
"city": "Murray",
"state": "KY",
"zip": "42701",
"country": "United States",
"email": "PTurner@adremail.com",
"phone": "123-456-7890",
"fax": "222-444-5555"}]
}'
```

Legal

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API Name: UpdateAccountV1R0
API Version: V1R0
API Document Version: V3

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