

# Changing your Merchant Account Information

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Once the Merchant Account is established, new campaigns are automatically linked. If any changes are needed on the account (legal name, DBA, account signer and banking information) then please complete the correct form and send it to Support. Reach out to your Customer Success Manager with additional questions.

**IMPORTANT:** If the **financial signer, legal name and banking information** all need to be changed at the same time, then a new Merchant Application is needed. Please contact [support@givesmart.com](mailto:support@givesmart.com) for assistance with submitting a new application.

**Note:** The forms will be returned if illegible, so please type or print neatly.

## Bank Change

1. Download the [Bank Change Request Form](#).
2. Have the application signer or authorized person complete.
3. Attach:
  - Voided business check OR a Bank Letter.
    - A bank letter must be on bank letterhead, dated within 30 days, include the organization's name, routing and account numbers, and a signature from a banker.
  - Bank letter verifying ACH withdrawal ID# G592126793 is added to the account.
4. The Legal signer or business owner must sign, date, and provide their title.
5. Submit the form and attachments to [Support@GiveSmart.com](mailto:Support@GiveSmart.com)
  - Submit all paperwork together to expedite the process.
  - It can take at least 7-10 business days upon submission to establish the new bank account.
  - ACH activity cannot take place in the new account until the process is complete.

## Legal Name Change

1. Download the [Legal Name Change Request Form](#).
2. The application signer or authorized person must complete it.
3. Attach:
  - Written documentation of the change request.
  - Either IRS Federal Tax ID or Federal IRS W9.
  - Email from the merchant account owner verifying the change.
4. The Legal signer or business owner must sign, date, and provide their title.
5. Submit the form and attachments to [Support@GiveSmart.com](mailto:Support@GiveSmart.com)
6. Submit all paperwork together to expedite the process.

7. It can take at least 7-10 business days upon submission to implement changes.
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## Financial Signer Change


1. Download the [Signer Change Request Form](#).
  2. The application signer or authorized person must complete it.
  3. Attach:
    - Written documentation, as an email from the new signer, requesting the change.
    - Proof the Signer is part of the organization (one of the following):
      - Corporate Minutes confirming the signer to their position.
      - Corporate Board of Resolution.
      - Articles of Incorporation or Organization.
  4. The NEW account signer/owner must provide their Driver's License with a change form that is hand-signed (pen to paper).
    - If the form is signed with a Digital software (ex: Docusign) the form must also be submitted with the receipt from that software and the signer's Driver's License will not be required.
  5. Submit the form and attachments to [Support@GiveSmart.com](mailto:Support@GiveSmart.com)
    - Submit all paperwork together to expedite the process.
    - It can take at least 7-10 business days upon submission to implement changes.
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## DBA Name Change

1. Submit a request to [Support@GiveSmart.com](mailto:Support@GiveSmart.com)
  2. Include the following information:
    - Organization Name
    - Current DBA Name
    - New DBA Name
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## Related Resources

 [Bank Change Request Form](#)

 [Legal Name Change Form](#)

 [Signer Change Form](#)

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