Changing your Merchant Account Information

Last Modified on 09/08/2026 11:07 am EDT

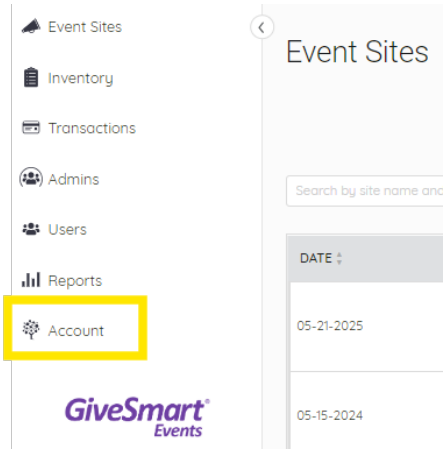
*Fiserv (formerly CardConnect)

This article details how to locate the information currently associated with your GiveSmart Events Merchant Account, and the steps to take to update key information such as the linked Bank Account for deposits, Legal Name/Tax ID, Financial Signer, and DBA name on file with the merchant services provider, Fiserv.

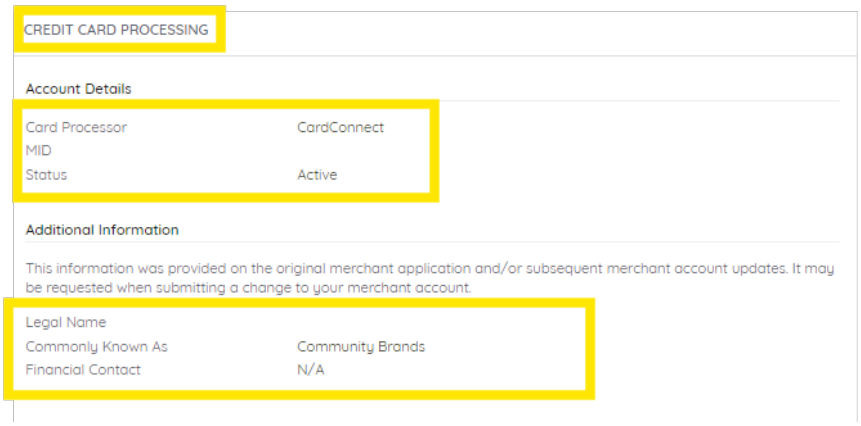
Note: Your Organization may have more than one merchant account, since all GiveSmart modules (Events, Fundraise, and Donor CRM) require their own unique merchant account ID (MID). Please reach out to your Customer Success Manager with additional questions.

How do I locate the information currently associated with my merchant account?

From your GiveSmart Event Org. Hub, navigate to the Account tab.



On the right-hand side, under Credit Card Processing, note your Merchant ID (MID), Status, as well as the current Legal Name, Commonly Known As (DBA Name), and Financial Contact (Account Owner/Signer) on file with Fiserv.



Once a GiveSmart Events Merchant Account is established (noted in the above Account details), new Event Sites that are created will be automatically linked to that merchant account by its merchant ID (MID).

Making changes to your Merchant Account

If any changes are needed for your Merchant Account (Legal Name/Tax ID, Account Owner/Signer, Banking Information, or DBA Name), please complete the correct form linked below and send it to GiveSmart Merchant Support at support@givesmart.com.

IMPORTANT: If all three details below need to be updated at the same time for a merchant account, a **new** Merchant Account Application is required. Don't hesitate to contact a senior merchant account agent at support@givesmart.com for assistance with submitting a new application.

- **Account Owner/Signer**
- **Legal Name and/or Tax ID**
- **Banking information**

Please Note:

Forms not submitted or signed directly by the merchant account owner/Signer on file (e.g., by another party on behalf of the merchant account owner/signer, or by any other party) **will be rejected**.

Forms that are incomplete or illegible will be returned.

Bank Account Change

1. Download the Bank Change Request Form
2. Have the account owner/signer on file for the merchant account, or an authorized person, complete the form neatly.
    - Attachments:
        - Voided Business Check (non-starter) **OR** a Bank Letter. The bank letter must be on bank letterhead, dated within the past 30 days, and include the organization's name, account and routing numbers, and a signature from a banker with contact information.
        - A Bank Letter verifying Fiserv's ACH withdrawal ID# G592126793 is added to the account.
3. The account owner/signer on file for the merchant account must sign, date, and provide their title.
    - **If the form is signed with a handwritten signature (pen to paper) the account owner/signer must also include a copy of their driver's license or government ID.**
    - **If the form is signed digitally, a digital receipt from the software used must accompany the change request form. Additionally, the account owner/signer must include a copy of their driver's license or government-issued ID.**
4. The account owner/signer must submit the form and attachments to support@givesmart.com from their email on file, requesting the update.
    - 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 and/or TIN Change

1. Download the Legal Name TIN Change Request Form
2. Have the account owner/signer on file for the merchant account.
3. Attachment:
    - Include One Supporting Document. Select from the following: Federal IRS W9, IRS Federal Tax ID (EIN) Letter (AKA: SS4 Letter), or 147-C.
4. Select the Reason for the Legal Update:
    - CORRECTING TAX INFORMATION ON FILE
    - FILING STATUS OF MERCHANT HAS CHANGED
    - OWNERSHIP OF THE LOCATION HAS CHANGED
5. The account owner/signer on file for the merchant account must sign, date, and provide their title.
    - **If the form is signed with a handwritten signature (pen to paper) the account owner/signer must also include a copy of their driver's license or government ID.**
    - **If the form is signed digitally, a digital receipt from the software used must accompany the change request form. Additionally, the account owner/signer must include a copy of their driver's license or government-issued ID.**

6. The account owner/signer must submit the form and attachments to support@givesmart.com from their email on file, requesting the update.
    - Submit all paperwork together to expedite the process.

Financial Signer Change

1. Download the Signer Change Request Form
2. Have the **NEW** account owner/signer on file for the merchant account or an authorized person complete the form neatly.

Note: If the old signer is no longer with the organization, the new signer can sign off on the forms

3. Attachments:

- Proof that the NEW account owner/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
- The account owner/signer on file for the merchant account must sign, date, and provide their title
    - **If the form is signed with a handwritten signature (pen to paper) the account owner/signer must also include a copy of their driver's license or government ID.**
    - **If the form is signed digitally, a digital receipt from the software used must accompany the change request form. Additionally, the account owner/signer must include a copy of their driver's license or government-issued ID.**
- The account owner/signer must submit the form and attachments to support@givesmart.com from their email on file, requesting the update.
    - Submit all paperwork together to expedite the process.

Doing Business As (DBA) Name Change

1. Submit an email request to Merchant Support at support@givesmart.com to ask for a DBA name update.
2. Include the following information:
    - Organization Name
    - Current DBA Name
    - New DBA Name

Note: To help ensure you receive Fiserv emails and prevent them from being filtered as spam

or junk mail, please add the following domains to your safe sender's or allow list:

- **cardpointe.com**
- **fiserv.com**

Adding these domains to your allow list will help ensure important communications are delivered to your inbox.

Related Resources

Bank Change Request Form

Legal Name TIN Change Request Form

Signer Change Request Form