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a CSG Company

Client Data Transfer Request

Merchants may have their client data transferred to other Forte merchants or a PCI compliant third party for the indicated fees. Select the desired option and fill out the section accordingly, sign and date the request then fax the completed form to 469-675-8731. All requests will be authenticated and verified.

Merchant Name_____ **Current MID**_____

Date of Request _____ **Transfer Request Date** _____

☐ OPTION #1: **I want to transfer all client records to a Forte Merchant ID: _____**

Include unprocessed (future) scheduled transactions: ☐ **NO** ☐ **YES (Select one)**

Client records will be transferred from one merchant account to the other after the request is approved.

☐ OPTION #2: **I want to transfer client records to multiple Forte Merchant IDs: _____**

Include unprocessed (future) scheduled transactions: ☐ **NO** ☐ **YES (Select one)**

Merchant will be provided a spreadsheet of clients and will need to fill in the Forte Merchant IDs they are to be transferred to. Client records will be transferred to the indicated Merchant IDs after the request is approved.

☐ OPTION #3: **I want to transfer client records to a PCI compliant third party.**

Send file via: ☐ **Email**   *(or)*   ☐ **FTP (Required for 10,000+ records)**

Data to be exported: ☐ **All**   ☐ **CC Only**   ☐ **EFT Only**   ☐ **Client Tokens**   ☐ **Payment Tokens**

Please provide the following:
i)   Third party contact information including entity name and email address.
ii)   We only accept data using a PGP Key. Please email the PGP key for encrypted file transfer to customerservice@forte.net; In the body, cite applicable Forte Merchant ID(s) and reference this faxed document. (Note: self-decrypting files are no longer acceptable)
iii)   Proof of Third Party's PCI-Compliance –This will be required if we are unable to independently verify such compliance

Data will be provided in spreadsheet format. Encrypted file will be transferred to the third party after the request is **approved** and the third party's PCI compliance is verified. Transfer fee: $149.00 + .10 per record. **(Max charge $500.00)**

_____

After the Transfer is complete:
(Check one of the following)

☐ Please Close MID_____

☐ Please Send a Closure Request form to _____ (email address)

☐ **Do Not** Close MID_____

_____   _____   _____
Current Forte Merchant ID   Authorized Signature   Title of Authorizing Individual