

# ISO Profile

Please take a moment to fill out this ISO Profile so that we can better serve your needs.

ISO DBA Name: \_\_\_\_\_

Type of Business:                      Sole proprietor                      Partnership                      Corporation

Name of Principal(s): \_\_\_\_\_

Principal (s) Tax ID/SSN: \_\_\_\_\_

Primary Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Alternate Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Business Phone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Fax: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Cell: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Email: \_\_\_\_\_

Years in the payment processing industry: \_\_\_\_\_

Previous processor: \_\_\_\_\_

What is the primary reason you left your previous processor? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What is the most important thing you're looking for in your relationship with us? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How did you hear about us? \_\_\_\_\_

Do you have a preferred terminal vendor?  Lipman  Verifone  Hypercom  Other: \_\_\_\_\_

Where do you expect to purchase equipment?

From TPG  From other source: \_\_\_\_\_

How were discounts for merchants set up at your previous processor?

Monthly discount                       Daily discount                       Don't know

What was the default deposit time at your previous processor?

48-hour (zero-day) delay                       48-72 hour (one-day) delay                       Don't know

How would you prefer to get your daily status reports?

Fax                       Email

What is the best way to reach you with important communications?

Mail                       Phone                       Email                       Fax