Steps to move your on-campus SGR to you off-campus account.

1. Your RSO will first need to apply for a Tax Identification Number (TIN) from the IRS. Here are instructions:

[Microsoft Word - Obtaining a TIN (gmu.edu)](https://si.gmu.edu/wp-content/uploads/2021/08/How-to-Apply-for-A-TIN.pdf)

1. After your RSO has a TIN, it should work directly with the bank of its choosing to open up an off-campus account in the name of its organization. Depending on the bank you choose you may be asked to prove you are a registered student organization at Mason. Email [sibudget@gmu.edu](mailto:sibudget@gmu.edu) to obtain an RSO letter of recognition. Here is a link to FAQ [Microsoft Word - Off-Campus Bank Account FAQs (gmu.edu)](https://si.gmu.edu/wp-content/uploads/2021/08/FAQs_Off-Campus-RSO-Bank-Accounts.pdf)
2. Once you have opened an account, you will need to submit a W-9 to Mason on behalf of your RSO.

* Go to the website: <https://fiscal.gmu.edu/purchasing/do-business-with-mason/>
* Click the link that says “Substitute W-9 form” – NOT the W-8s
  1. Fill out the form in its entirety
     1. EIN
     2. Legal Name (Name of the **business** the invoice will come from)
     3. Business Name (Name of the **business** the invoice will come from)
     4. Entity Type
     5. Entity Classification
     6. Legal Address
     7. Remittance Address (this address is where the check will be sent to!)
     8. Contact Information
     9. Printed Name
     10. Authorized U.S. Signature
         1. The needs to be hand-signed, Accounts Payable does not accept electronic signatures
            1. Date
  2. Print or save the completed “Substitute W-9” form
* Go back to the website: <https://fiscal.gmu.edu/purchasing/do-business-with-mason/>
* Click the big green button that says “Vendor Registration: Submit Completed Substitute W-9 or W-8” which takes you to the Vendor Maintenance Form
* Under “Payee Contact Information” select: I am “receiving a revenue refund, honorarium, participant support payment, or equivalent”.
* Fill out the required information
* IMPORTANT: For Mason Contact Information, type in:
  1. Christine Kelley, sibudget@gmu.edu
  2. IMPORTANT: If you do not complete the Mason Contact Information, we will not be notified that the form was submitted and therefore will not know to approve payment.
* Upload the Substitute COV W-9 (NOT W-8 or regular W-9). “Choose File”.
* Click “Submit Form”

1. Contact [sibudget@gmu.edu](mailto:sibudget@gmu.edu) to fill out the Revenue Refund Form. The check will be mailed to the address submitted on the W-9.
2. For best practices and other info please follow this link: [Policy-6000-Student-Org-Financial-Best-Practices.pdf (gmu.edu)](http://fiscal.gmu.edu/wp-content/uploads/Policy-6000-Student-Org-Financial-Best-Practices.pdf)