How To: Add/Update My Banking Information

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Add/Update My Banking Information

In order to update your banking information on your investment account(s), one of the following forms of documentation listed below will be required before we can begin processing the request.

1. Voided Check
2. Bank Statement - must show the full account name and full account number
3. Savings Deposit Slip
4. Corporation/Trust Voided Check - in addition to a voided check, a letter from the bank stating the authorized users on the account is required

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Next Steps

Step 1: Once one of the required documents listed above have been retrieved, please send an email to clientsuccess@financialgravity.com with your request to add or update the bank account on your investment accounts. See the link below for an article in how to share this documentation with us in a secure way.

Share a Document with FG Securely

Step 2: Our back office team will create a service ticket for your request to be put in the queue. You will receive an email response from the team letting you know that we have received your request.

Step 3: Our team will prepare the appropriate paperwork for your accounts to have this updated.

Step 4: An email reply will be sent to you letting you know what forms are needed and how we will be sending them to you along with additional instructions if necessary.

Step 5: Once all of your accounts have been updated, our team will notify you via email that the changes have been made.

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