



FAQs about Billing Contact Information

The MSRB is providing these questions and answers to clarify how to provide billing contact information in support of electronic billing.

Part 1: General Questions and Answers

What is a “billing contact”?

An MSRB “billing contact” is a person or office that receives electronic bills from the MSRB. For example, the billing contact may be an Accounts Payable staff member. A billing contact is responsible to:

- Receive electronic statements and invoices from the MSRB
- Forward them, if necessary, to the appropriate place in the firm
- Keep current information in the MSRB’s Gateway system about the contact’s name, address and email address, and
- Act as the MSRB’s first point of contact regarding billing and payment questions.

What’s the difference between my firm’s G-40 contact and our billing contact?

The **G-40 contact** is the registrant’s official contact for email communication between the registrant and the MSRB. (Subscribers have an equivalent “Master Account Administrator” or MAA.) The **billing contact** is a member of the firm who receives electronic bills. The G-40 contact identifies the billing contact to the MSRB and provides the billing contact’s information including the email address. The G-40 contact and the billing contact may be the same person (as in a small firm) or they may be different persons.

As the billing contact in a large firm, how can I find out who our G-40 contact is?

You may contact MSRB Support at (703) 797-6668 or MSRBsupport@msrb.org to find out your firm’s G-40 contact. We’ll ask you to provide your firm’s MSRB ID number (e.g., A1234 or K1234).

Must the billing contact be a person? Can it be an office with an email address, for example, AccountsPayable@MyFirm.com?

The billing contact must be a person. However, the email address to receive bills can be an office such as AccountsPayable@myfirm.com.

Can my firm have more than one billing contact?

No. The billing contact is the single point of contact for receiving bills.

What should I do if a billing contact goes on vacation or is unavailable?

The firm's G-40 contact or MAA can replace one billing contact with another, using the MSRB's Gateway system. The replacement can be temporary or permanent.

Whom shall I call with additional questions or for help?

MSRB Support at (703) 797-6668 or MSRBsupport@msrb.org can answer additional questions and help you provide billing contact information.

Part 2: How Does the Firm Provide and Update Billing Contact Information?

How does a firm set up a billing contact initially?

The firm's G-40 contact or Master Account Administrator provides initial information about the billing contact. On www.msrb.org, login to Gateway, then choose "Manage Billing Contact" under "Account and Organization Management."

MSRB Gateway Main Menu

Welcome to MSRB Gateway! Your User Account has the following Access Rights:

(Click on a section to expand)

[-] Account and Organization Management

Manage profile information for your User Account or for your organization.

> Manage User Accounts

Add, edit, and disable individual User Accounts for various organizations.

> Manage Billing Contact

Enter/Edit billing contact information.

> View Account Administrators

View your organization's Account Administrators.

> Manage Groups

Use Groups to help organize MSRB Staff Accounts.

> Manage Continuing Disclosure Confirmation Requests

Process confirmation requests and invite individuals to register to submit continuing disclosure submissions.

My Profile	
User ID:	SCOOK
Role:	Master Account Administrator
User Name:	STEVE AB COOK
Organization Name:	MSRB
MSRB ID:	MSRB
Email Address:	SCOOK@MSRB.ORG
	Change Passw



If the billing contact does not already have a Gateway account, complete the "Add/Edit Billing Contact Information" screen. Gateway will create a new account for the contact. If you wish to designate an existing account holder as the billing contact, click "Replace Contact" at the bottom of the screen and choose a user name from the next screen. The user's information will appear on the "Add/Edit" screen. Verify it is accurate and click "OK."

Once the billing contact is designated, the information must be kept current.

- If the billing contact remains the same person or office but information about the contact changes:
 - Either the billing contact changes its own information, using “Edit” in “My Profile” (shown below), or
 - The G-40 contact (MAA) changes the billing contact information.
- If the billing contact is replaced by someone else:
 - The G-40 contact (MAA) must replace the billing contact by a new Gateway account holder.

MSRB Registration - Add Billing Contact Information

Please describe your contact for billing purposes. The email address provided will be used to electronically deliver invoices and statements to you. You must update this information if it changes. You must provide billing contact information if you are required to pay an annual fee, transaction/technology fee, or underwriting fee to the MSRB, or if you receive an MSRB information product under a subscription agreement. If none of these apply, or you do not know your billing contact information, you may click 'Skip Contact' to proceed to the next screen.

If this information is the same as your primary contact information, select "Use G-40 Primary Contact." Otherwise, select "New Contact" Remember, if you select the primary contact information, the email address associated with the contact selected will be used to electronically deliver invoices and statements to you.

Use G-40 Primary Contact New Contact

Click "OK" to submit any changes.

Billing Contact:

First Name:*
Middle Name:
Last Name:*
Name Suffix:
Email Address:*
Confirm Email:*
Phone Number:* - - Ext.
Address1:*
Address2:
City:*
State:*
Zip:*
Country:

*required


Cancel

Previous

OK

Skip Contact

This is the place where the billing contact can change his or her account information.

My Profile [Edit](#) 

User ID:	SCOOK
Role:	Master Account Administrator
User Name:	STEVE AB COOK
Organization Name	MSRB
MSRB ID	MSRB
Email Address:	SCOOK@MSRB.ORG

[Change Password](#)

Note that you cannot delete the billing contact. You can only replace a former billing contact with a new one.

My firm is in the process of registering with the MSRB for the first time and I am setting up my account as G-40 contact or MAA. How do I designate a billing contact?

The G-40/MAA account set-up process includes instructions for entering information about a new billing contact. However, if you do not know who your billing contact will be at the time you set up your G-40 account, you may skip the screen for inputting that information. You must provide billing contact information to the MSRB by the end of the calendar month of your initial registration.