



Report a Business Merger or Acquisition

1. Ensure that the new or surviving entity is registered in AIMS. The new or surviving entity must be the one reporting the merger or acquisition. If it isn't a current TABC license or permit holder in AIMS, you must create a new master entity by selecting **Add Another Business** from the top-right user icon in their AIMS account.

The screenshot shows the AIMS user interface. At the top left, it says 'TABC - AIMS'. At the top right, it says 'Sample User' next to a user icon. Below the user icon is a dropdown menu with the following options: 'Welcome! John Doe Sample User', 'Change Password', 'Change Email', 'Change Security Questions', 'Switch Accounts', '+ Add Another Business', and 'Logout'. A red arrow points to the '+ Add Another Business' option. In the main content area, there is a 'Welcome John' message and a table of business entities.

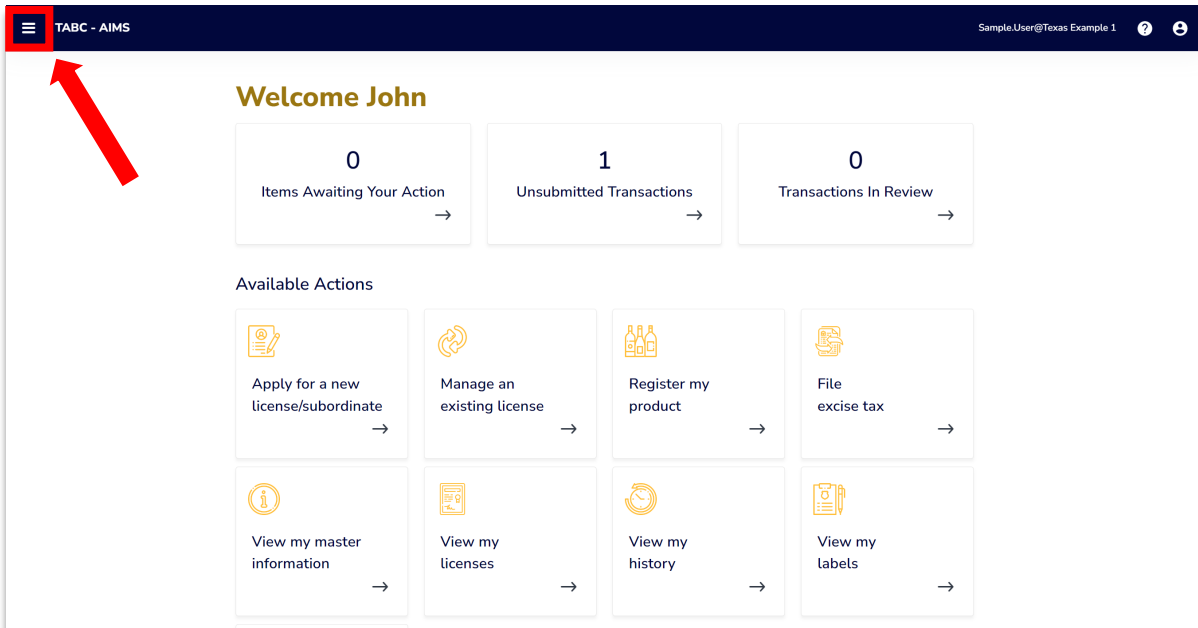
Owner/Entity Name	Action
Texas Example 1	→
Texas Example 2	→

2. If you have more than one business entity, select the one that now owns the surviving or new entity that is submitting the request.

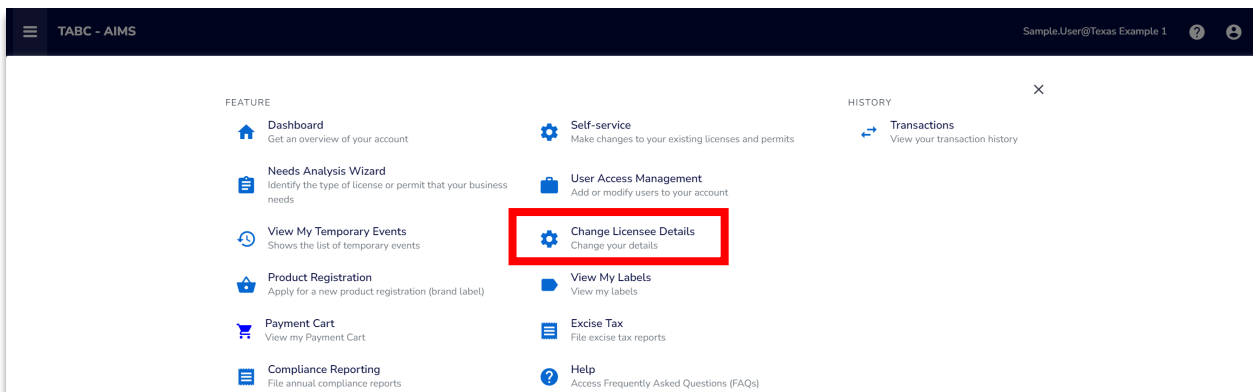
The screenshot shows the AIMS user interface with the 'Welcome John' message and the business entity selection table. The table has two columns: 'Owner/Entity Name' and 'Action'. There are two rows of data: 'Texas Example 1' and 'Texas Example 2', each with a right-pointing arrow in the 'Action' column.

Owner/Entity Name	Action
Texas Example 1	→
Texas Example 2	→

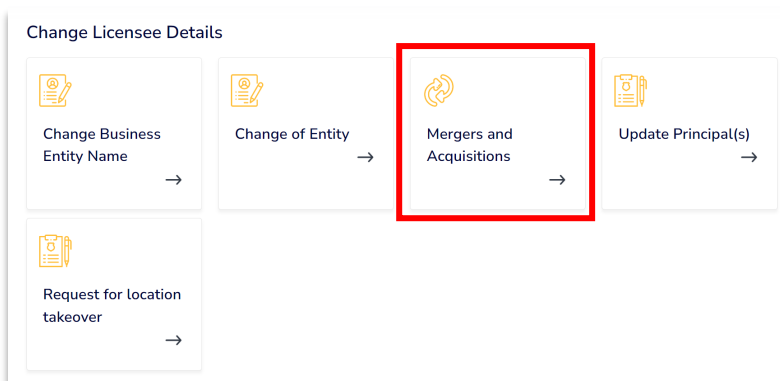
3. Select the three lines in the upper-left corner of the AIMS dashboard.



4. Click **Change Licensee Details**.



5. Select **Mergers and Acquisitions**.



6. Review the instructions to ensure you have all the required information and documentation. Click **Next**.

Mergers and Acquisitions

Instructions

This process allows a business to report entity changes resulting from a merger or an acquisition and to update TABC licensed locations (including any applicable subordinate privileges/authorizations) to reflect the appropriate owner. The following requirements apply:

- The **surviving master entity** must submit the merger or acquisition. If the surviving master entity is not a "master entity" in AIMS, click the user icon in the top-right menu and select **+ Add Another Business** to create a new entity. **Do this before starting the application.**
- Provide supporting documentation of the entity changes for the selected locations. This may include:
 - Certificate of merger/acquisition.
 - Articles of merger/acquisition.
 - Confirmation of merger/acquisition issued by a state agency.
- Submit the required fee(s).
- [View more instructions for mergers and acquisitions.](#)

TABC will review your application and may request any additional information from any involved party. The requested change will display in AIMS once approved.

NEXT

7. Search and add the licenses or permits affected by the merger or acquisition.
Click **Add New License**.

Acquired License Selection

ADD NEW LICENSE

Drag a column header and drop it here to group by that column

License Number	Entity Name	License Type	Expiration Date	Status	Actions
No items to display					

Note: The active subordinates of this selected license will be transferred to the applicant's business entity after the merger application is approved by TABC.

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NEXT

8. Use the search fields to find the current business entity of the licenses subject to the merger or acquisition. Click **Search**.

Search License(s) by Entity

Entity Name

Social Security Number (SSN) Federal Employer ID Number (FEIN)

First Name Last Name

9. Select the license(s) subject to the merger or acquisition and click **Next**.

* Please select the License(s) subject to the Merger and Acquisition transaction.

Double click on header check-box to select all records of the below list.

<input checked="" type="checkbox"/>	License #	License Status	Entity Name	License Type
<input checked="" type="checkbox"/>	200034373	Active	TABC TEST LLC	Wine and Malt Beverage Retailer's On-Premise Permit (BG)

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10. The selected license(s) will display on the **Acquired License Selection** screen. Repeat this process until all licenses subject to the merger or acquisition display. Click **Next**.

Acquired License Selection

Drag a column header and drop it here to group by that column

License Number	Entity Name	License Type	Expiration ...	Status	Actions
200034373	TABC TEST LLC	Wine and Malt Beverage Retailer's On-Premise Permit (BG)	6/9/2026	Active	<input type="button" value="🗑️"/>

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Note: The active subordinates of this selected license will be transferred to the applicant's business entity after the merger application is approved by TABC.

11. Provide the details of the change. Click **Next**.

Provide More Details

Action Type *
--Select--

Effective Date of Change *
06/18/2024

Please provide supporting documentation *
SELECT FILES... Drop files here to upload

BACK **NEXT**

12. Report the principal parties of the new or surviving entity.

Click **+ Add Principal/Owner** button to add a new party.

TABC - AIMS Sample.User@Texas Example 1

Business Entity Information

INSTRUCTIONS

Final Entity Name: **Texas Example 1** **+ ADD PRINCIPAL / OWNER**

Provide the details of each officer, and any stockholder with an ownership interest greater than 50%, for the reported entity. Please be prepared to provide 100% ownership information at TABC's request.

Drag a column header and drop it here to group by that column

Name	Principal Party Name	Role	Ownership	Status	Actions
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10 Items per page 0 No items to display

BACK **NEXT**

13. Complete the information.

Click **Next** when complete.

Legal Last Name *

Roberts

Date of Birth *

.....

Do you have a Social Security Number? *

Yes

Enter your Social Security Number *

.....

Re-enter your Social Security Number *

.....

BACK NEXT

Edit an Existing Principal or Owner

Select the **edit icon** next to an existing principal party to update their information, such as title or ownership percentage.



Business Entity Information

Entity Name: [blurred] [+ ADD PRINCIPAL / OWNER](#)

Only principal parties who hold more than 50% of stock should be entered as stockholders. If no individual Stockholder owns more than 50% then Stockholder information is not required.

Drag a column header and drop it here to group by that column

Name	Type	Role	Owner...	Status	Actions
[blurred]	Person	Manager, Member	85%	Incompl...	PERSONAL INFO
[blurred]	Person	Manager, Member	15%	Incompl...	PERSONAL INFO

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Follow the onscreen instructions and make the necessary edits. When complete, click **Next**.

TABC - AIMS

Legal Last Name *
Roberts

Date of Birth *
.....

Do you have a Social Security Number? *
Yes

Enter your Social Security Number *
.....

Re-enter your Social Security Number *
.....

BACK NEXT

Delete an Existing Principal or Owner.



Select the **delete icon** next to an existing principal party to remove their information, then confirm.

Business Entity Information

INSTRUCTIONS

Entity Name: **Texas Example 1** + ADD PRINCIPAL / OWNER

Provide the details of each officer, and any stockholder with an ownership interest greater than 50%, for the reported entity. Please be prepared to provide 100% ownership information at TABC's request.

Name	Type	Role	Ownership	Status	Actions
John Doe	Person	President, Stockholder/Shareholder	100%	Incomplete	  PERSONAL INFO

1 - 1 of 1 items

Once the principal party information is complete, click **Next**.



Business Entity Information

INSTRUCTIONS

Final Entity Name: **Texas Example 1** [+ ADD PRINCIPAL / OWNER](#)

Provide the details of each officer, and any stockholder with an ownership interest greater than 50%, for the reported entity. Please be prepared to provide 100% ownership information at TABC's request.

Drag a column header and drop it here to group by that column

Name	Principal Party Name	Role	Ownership	Status	Actions
Texas Example 1	John Doe		100	Initiated	 

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NEXT

14. Complete the attestations and signature. Download a copy of the application summary for your records.

Mergers and Acquisitions Application Summary

You must review your application and confirm that the information displayed here is correct. Select **Review and Confirm** to continue and make the payment. If the information is not correct, select **Next** to return to the application, edit the data as needed and finalize the submission. If you need to store the application packet for your records, select **Download**.

Application ID: 370608
Applicant Name: Texas Example 1
Application Type: Merger **As of date:** 06/19/2024

Entity Information

Applicant Entity

Business Structure: Corporation
Business Entity Name: Texas Example 1

Signature

This application was digitally signed by : John Doe on 06/19/2024 10:31 AM

BACK **DOWNLOAD** NEXT

15. Follow the onscreen instructions to complete payment and submit the application.

Payment Details

Electronic payment is **required** before any work item submitted will be considered complete and **received** by TABC. After completing the information below and clicking "PAY NOW," you'll be redirected to the third-party provider Texas.gov to submit payment. * Required field

Application ID: 370608

Transaction Details	Amount	Edit	Delete
Merger	\$100.00	Edit	Delete

Description	Fee
Admin Fee Merger	\$100.00

Choose Payment Type * Credit Card

Agency Fee * \$100.00

Total Costs \$102.51

*This service is provided by Texas.gov, the official website of Texas. The price of this service includes funds that support the ongoing operations and enhancements of Texas.gov, which is provided by a third party in partnership with the State.

By selecting this checkbox, I swear that I have voluntarily executed this application.

PAY NOW

Once submitted, you can download a copy of the receipt for your records.

Payment Details

* Required field

Application ID: 370608

Your payment has been successfully processed. Please download the receipt for your records.

Transaction Details	Amount
Merger	\$100.00

5 items per page 1

1 - 1 of 1 items

DOWNLOAD RECEIPT