

CHANGE/UPDATE ACCOUNT CONTACT INFORMATION

PART 1. ACCOUNT OWNER INFORMATION

First Name: M.I.: Last Name: Account #:

Last 4 SSN: Date of Birth: (MM/DD/YYYY) Email Address:

Check here to apply this change to all accounts owned by the above listed account owner.

PART 2. NEW CONTACT INFORMATION

Address: City: State: Zip:

Primary Phone: Type: Alt Phone: Type:

Email:

PART 3. ACCOUNT OWNER AUTHORIZATION

I certify that all information provided by me is correct and may be relied upon by the Custodian. I understand that I am responsible for determining eligibility requirements related to my account(s) and investments and if necessary have sought assistance from qualified legal, tax, or investment professionals. I understand that I may be required to complete further identity verification prior to these changes taking effect.

Signature of Account Owner: Account Owner Name: (Print or Type) Date: (MM/DD/YYYY)