

IRA ACCOUNT INFORMATION CHANGE FORM

ACCOUNT INFORMATION

Name on Account: _____ SSN #: _____
Address: _____
E-mail: _____ Phone #: _____ Birthdate: _____

SUPPORTING DOCUMENTATION

If updating or changing the name, Social Security Account or, Date of Birth of the Account Owner, provide reason for change and submit documentation supporting the legality of the change (copy of divorce papers, marriage license, driver's license, Social Security card, recent utility bill, etc.) with this form. You should expect to receive communication from us related to any such changes, please be sure to provide an e-mail address and/or telephone number above.

Reason: _____

Supporting Documentation being provided (please list):

CHANGE OF ADDRESS

Previous Address: _____
New Address: _____

CHANGE OF NAME

Previous Name: _____
New Name: _____

CORRECTION OF SOCIAL SECURITY NUMBER

INCORRECT SOCIAL SECURITY NUMBER: _____
CORRECT SOCIAL SECURITY NUMBER: _____

CORRECTION OF DATE OF BIRTH

INCORRECT DATE OF BIRTH: _____
CORRECT DATE OF BIRTH: _____

SIGNATURES

Under penalties of perjury, I certify that the above information (including my social security number) is correct. I hereby agree to participate in the Individual Retirement Custodial Account offered by the Custodian. I acknowledge receipt of a copy of the plan document under which this Individual Retirement Account is established, a copy of this Adoption Agreement, and a copy of the Disclosure Statement with respect to the Individual Retirement Account(s) being established. I direct that all benefits upon my death be paid as indicated above. In the event that this is a rollover contribution, the undersigned hereby irrevocably elects, pursuant to the requirements of Section 1.402(a)(5)-1T of the IRS regulations, to treat this contribution as a rollover contribution. If I named a beneficiary which is a Trust, I understand I must provide certain information concerning such Trust to the Custodian.

Participant Signature: _____ Date: _____
Authorized Signature of Trustee/Custodian: _____ Date: _____

If you have not done so to date, Please complete and sign an [IRA Adoption Agreement](#) and return along with this form, along with a clear copy of a government issued photo identification.