

# IRA CHANGE OF ACCOUNT INFORMATION



Questions? Call us at 800-332-5580

P.O. Box 9763, Providence, RI 02940  
 Overnight Mail: 4400 Computer Drive  
 Westborough, MA 01581

## 1 CURRENT ACCOUNT INFORMATION (Must be completed)

XXX-XX-\_\_\_\_\_

Owner's Name: (First, Middle Initial, Last)

Last 4 digits of SSN

Account Number

## 2 CHANGE OF ADDRESS

### a.) Former Primary Address:

Street Address

City

State

Zip Code

### New Primary Address:

Street Address

City

State

Zip Code

### b.) Add Seasonal Address (Temporary change | Must complete dates)

Start Date

\_\_\_\_/\_\_\_\_/\_\_\_\_

End Date

\_\_\_\_/\_\_\_\_/\_\_\_\_

Street Address

City

State

Zip Code

## 3 CHANGE OF NAME (Please indicate former and new name below. Medallion Signature Guarantee required)

Former Name (First, Middle Initial, Last)

New Name (First, Middle Initial, Last)

Reason for Name Change	
<input type="checkbox"/> Marriage	<input type="checkbox"/> Legal Name Change
<input type="checkbox"/> Divorce	<input type="checkbox"/> Name Correction
<input type="checkbox"/> Other (specify)	

## 4 CHANGE OF BENEFICIARY DESIGNATION

Check a box to indicate a primary or contingent beneficiary. A contingent beneficiary is a beneficiary of proceeds only if all primary beneficiaries are deceased or unable to be located. **Completion of this form changes any existing beneficiary designation in its entirety.**

**Per Stirpes Beneficiary Designations** - The Custodian shall accept as complete and accurate all written instructions provided in good order by the estate/executor with regard to the identification of the beneficiaries and the allocations thereto.

Type of Beneficiary	Share %	Name	Birthdate	SSN/TIN	Relationship
<input type="checkbox"/> Primary					
<input type="checkbox"/> Primary <input type="checkbox"/> Contingent					
<input type="checkbox"/> Primary <input type="checkbox"/> Contingent					
<input type="checkbox"/> Primary <input type="checkbox"/> Contingent					
<input type="checkbox"/> Primary <input type="checkbox"/> Contingent					

**Spousal Consent – Custodian Disclaimer:** The Participant's spouse may have a property interest in the account and may also have a right to dispose of that property interest by will. Therefore, the Custodian, together with any sponsors, issuers, depositories or other persons or entities associated with the investments in the account, specifically disclaim any warranty as to the effectiveness of the Participant's beneficiary designation in this Beneficiary Designation Change Form, or any warranty as to the ownership of the account after the death of the Participant or the Participant's spouse. For additional information, a qualified tax or legal professional should be consulted. **(Continued on back side.)**

