

3. UPDATE IRA OWNER INFORMATION

If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your CalSavers IRA.

If you are changing your name, you must also provide a Medallion Signature Guarantee below or legal document(s) verifying the name change.

IRA Owner Legal Name (First) (M.I.)

IRA Owner Legal Name (Last)

Email Address

Physical Address (We cannot accept a PO Box)

City State Zip Code

Mailing Address if different from above (This address will be used as the address of record and for all mailings)

City State Zip Code

Telephone Number

Medallion Signature Guarantee — REQUIRED FOR NAME CHANGES TO THE ACCOUNT OWNER OF AN EXISTING ACCOUNT ONLY

- You must provide the following information as underwritten certification that the new signature is genuine.
You can obtain a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public cannot provide a Medallion Signature Guarantee, nor can you guarantee your own signature.
Do not sign below until you are in the presence of the authorized officer providing the signature guarantee.

By signing here I certify that the information provided herein is true and complete in all respects.

Former Signature of Account Owner (For name change only)

Current Signature of Account Owner

Signature of Guarantor

Authorized Officer to Place Stamp Here

Title

Name of Institution

Date (mm/dd/yyyy)

