



## 2. Updated Account Owner Information *(If applicable)*

- If you are changing your contact information, provide the new information exactly as you would like it to appear on your iDeal account.
- If you are changing your name, you must provide a signature guarantee in **Section 7**.

Name of Account Owner *(first, middle initial, last)*

Daytime Telephone Number

Evening Telephone Number

E-mail Address

Permanent Street Address *(A.P.O. box or rural route number is **not** acceptable.)*

City

State

Zip

Account Mailing Address if different from above *(This address will be used as the account's address of record and for all account mailings.)*

City

State

Zip

## 3. Transfer Assets to New Account Owner *(If applicable)*

- This will transfer ownership of all of the assets on the referenced account to the new account owner listed below.
- The new account owner will control the account and the disposition of all assets held in the account.
- The new account owner must also complete an **Enrollment Form**.

Account Number *(if applicable)*

Name of New Account Owner *(first, middle initial, last)*

Social Security Number or Taxpayer Identification Number **(Required)**

Birth Date/Trust Date *(mm/dd/yyyy)*

**4. Successor Account Owner Information** (If applicable)

- Complete this section only if you are adding, changing, or removing successor account owner information on your account.
- You may revoke or change the successor account owner at any time. See the IDEal Highlights Booklet and Disclosure Statement for more information.
- The person you designate as successor account owner **must be at least 18 years old and a U.S. citizen or resident alien.**

**Check one.**     Add     Change     Delete

Name of Successor Account Owner (first, middle initial, last)

Birth Date (mm/dd/yyyy)

**5. Interested Party Information** (If applicable)

Complete this section if you want additional persons to receive account statements on the account or if you are changing interested party information on your account. To add or change information for more than one interested party, use a separate sheet.

**Check one.**     Add     Replace interested party     Change current information     Delete

Name (first, middle initial, last)

Address

City

State

Zip

Daytime Telephone Number

Relationship to Account Owner

**6. Signature — YOU MUST SIGN BELOW** *However, if you are changing your name, skip this section and complete Section 7 instead.*

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

➤

Signature of Account Owner

-   -

Date (mm/dd/yyyy)

**7. Signature Guarantee – REQUIRED FOR NAME CHANGES ONLY**

- You must provide the following information as underwritten certification that your new signature is genuine.
- You can obtain a signature guarantee from an authorized officer of a bank, broker, or other qualified financial institution. *A notary public cannot provide a 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.**

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

➤

Former Signature of Account Owner

-   -

Date (mm/dd/yyyy)

➤

New Signature of Account Owner

-   -

Date (mm/dd/yyyy)

➤

Signature of Guarantor

Title/Name of Institution

-   -

Date (mm/dd/yyyy)

**Authorized Officer to Place Stamp Here**

[Empty box for Authorized Officer to Place Stamp Here]