

## ACCOUNT CHANGE REQUEST FORM

### ACCOUNT NUMBER(S)

### PLATFORM

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

☐ IWS /NFS      ☐ PERSHING DBS  
☐ PERSHING PAS      ☐ TD Ameritrade  
☐ SCHWAB      ☐ OTHER

Primary \_\_\_\_\_

Joint Owner: \_\_\_\_\_

Owner: Name ☐ \_\_\_\_\_ ( Attach Documentation For Name Change )

Change:      Seasonal Address Standing Instructions ("Snowbirds"; Complete Every Three Years):

New Address: ☐ Mailing Address

☐ Legal Address

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

☐ Phone & Email

☐ Phone & Email

(H) \_\_\_\_\_

(H) \_\_\_\_\_

(W) \_\_\_\_\_

(W) \_\_\_\_\_

(M) \_\_\_\_\_

(M) \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_

**I hereby attest to the fact that I have verbally confirmed the above changes with the client (or authorized individual) on \_\_\_\_\_ (date) at \_\_\_\_\_ (phone number) or at \_\_\_\_\_ (in person).**

Authorized Signature \_\_\_\_\_ Date: \_\_\_\_\_

Principal Approval: \_\_\_\_\_ DATE: \_\_\_\_\_

☐ Yes, I am properly Registered to do business in the new state of residence.

Attach any back up from client.