

NAME CHANGE FORM

For assistance in completing this form, please call a BNY Brokerage Account Representative at 1-800-843-5466

Instructions

This form should only be used to change the registration on an existing BNY Brokerage account because of a legal name change. It should not be used to open a new account.

1. Complete all sections of this form and sign your former name and new name.
Your former signature must be notarized.

2. Mail this completed form to:

BNY Brokerage Services, P.O. Box 958408, Lake Mary, FL 32795

3. Send Registered or Certified mail to:

**BNY Brokerage Services, 600 Colonial Center Parkway, Suite 400,
Lake Mary, FL 32746**

■ Please enclose documentation supporting name change, such as copy of marriage certificate, Divorce decree, or other Legal documentation.

Important Information

■ If your account has the Checkwriting Privilege, please make sure that all outstanding checks are paid before submitting this form. When we change your name on the account we will send you a new book of checks. **We will be unable to honor checks using your former signature.**

■ If the bank account information for the Telephone Redemption and/or TeleTransfer privileges on your account have been changed, please call a BNY Brokerage Account Representative at **1-800-843-5466** for additional information.

Please note: A new account number **will not** be assigned.

Account Information

Please print all items except signatures.

Please provide this information exactly as your Brokerage account is currently registered.

Name of current registered owner of your BNY Brokerage account(s)

Account Number

Address

City

State

Zip Code

Telephone Number

Taxpayer Identification Number on account(s)

E-Mail Address

Certification

I hereby certify that (Print Former Name) _____
was changed to (Print New Name) _____ and is
one and the same person. Please change the registration to reflect my change of name.

Signatures

Please sign your former name and new name.

Former Signature

New Signature

FOR NOTARY PUBLIC USE ONLY:

Sworn to (or affirmed) before me this

_____ day of _____, 20____

(Give official capacity of official administering oath.)

My commission expires _____

(AFFIX SEAL.)

X _____
Signature of Notary Public

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Lake Mary, FL 32795

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600 Colonial Center Parkway
Suite 400
Lake Mary, FL 32746