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Change of Information Form

Traditional | Roth | SEP | SIMPLE

PTC IRA Account Number

SECTION 1 | IRA Account Owner Information

First Name Last Name Last 4 Digits of SSN DOB (MM/DD/YY)

SECTION 2 | Change Information

All change of **name requests** must be accompanied by an updated copy of a government issued ID such as a drivers license, passport, or state issued ID.

PREVIOUS name, address, telephone, or email address

Name
 Address
 City
 State Zip
 Phone Number
 Email Address

CURRENT name, address, telephone, or email address

Name
 Address
 City
 State Zip
 Phone Number
 Email Address

SECTION 3 | Acknowledgement

Signature of IRA Account Owner Date

INTERNAL USE ONLY

Verified
 (Initials and Date)