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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 - Name

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

Name

CURRENT Name

Name

SECTION 3 | Change Information - Address

Change of **address requests** must be accompanied by a document that has your name and the new address such as a drivers license or utility bill.

PREVIOUS Address

Address
 City
 State Zip

CURRENT Address

Address
 City
 State Zip

SECTION 4 | Change Information - Phone and Email

If you need to change your phone number or email, send an email to info@ptcemail.com regarding the change request. **Note that Preferred Trust Company requires a verbal confirmation of phone number and email changes for client identification and security reasons.**

SECTION 5 | Acknowledgement

Signature of IRA Account Owner Date

INTERNAL USE ONLY

Verified
(Initials and Date)