



Use this form to notify IRA Services that your name has changed.

## HELPFUL TO KNOW

- You must either attach a photocopy of a marriage certificate, divorce decree, or other court document showing your new name OR get a signature guarantee.
- To change your personal information, please go to [IRAServices.com](http://IRAServices.com) to complete 'Account Owner Information Change' form.

## 1. PERSONAL INFORMATION (\*required field)

Should IRA Services need to contact you in regards to this request, your preferred method of contact is:

Email

Primary Phone

First Name*	Middle Name	Last Name*
Account Number*	Social Security Number* (last 4 digits)	Date of Birth* (MM/DD/YYYY)
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

## 2. ACCOUNT OWNER

Be sure to include proper documentation (see above). We will change your name on ALL accounts within IRA Services.

Former Name

First Name	Middle Name	Last Name*
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New Name

First Name	Middle Name	Last Name*
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## 3. SIGNATURE AND DATE (Account owner must sign and date)

By signing below, you:

- Authorize IRA Services to act on all instructions given on this form.
- Accept all terms and conditions described in this form.
- Certify that all information you provided is correct to the best of your knowledge.
- Please attach documentation such as court order or marriage certificate.

Name and Signature on IRA Services Account

Account Owner Name	
Account Owner Signature X	Date (MM/DD/YYYY)

Please sign and submit additional documents as required.

## DELIVERY INSTRUCTIONS

Please include the appropriate required documents described above.

**Email**  
newaccounts@IRAServices.com

**Fax**  
(650) 745-2902

**Regular mail**  
IRA Services  
PO Box 7080  
San Carlos, CA 94070-7080

**Overnight mail**  
IRA Services  
1160 Industrial Road, Unit 1  
San Carlos, CA 94070-4128