

# Change of Address Form

**Investment Advisor ("IA") Information (This portion to be completed by IA.)**

**IA Firm Name** (Please print.)

**IA Master Account Number**

**Service Team**

**IA Contact Name** (if follow-up is required)

**IA Telephone Number**

**IA Email Address**

- For Trust Accounts, the address for the Trust must match the address of one of the trustees.
- For changes requiring a c/o address for a third party, please use the Third-Party Representative Address Authorization Form.
- If you are changing a U.S. address to an international address, please contact your service team; additional documentation may be required.

Type of Change (Please select all that apply):

- |   |  |
|---|--|
| <input type="checkbox"/> <b>Account Holder Address</b> (Complete Sections 1 and 3.)       | <input type="checkbox"/> <b>Organization/Pension Plan Address</b> (Complete Sections 2 and 3.)       |
| <input type="checkbox"/> <b>Account Holder Phone Numbers</b> (Complete Sections 1 and 3.) | <input type="checkbox"/> <b>Organization/Pension Plan Phone Number</b> (Complete Sections 2 and 3.)  |
| <input type="checkbox"/> <b>Account Holder Email Address</b> (Complete Sections 1 and 3.) | <input type="checkbox"/> <b>Organization/Pension Plan Email Address</b> (Complete Sections 2 and 3.) |
| <input type="checkbox"/> <b>Order new address imprinted on Schwab One® checks.</b>        |  |

This change should take effect:  **Immediately**     **Effective Date:** \_\_\_\_\_

To make account updates immediately, please visit [www.SchwabAlliance.com](http://www.SchwabAlliance.com) or ask your Advisor about electronic approval options.

## 1. Account Holder Information

By updating your contact information below, your customer record will be updated with the information provided. **Caution:** You may have multiple accounts associated with your customer record, including Individual, Trust, Corporations, etc. All accounts associated with your profile will be updated with the new contact information you have provided.

**Account Holder/Trustee/Authorized Agent/Custodian/Executor.** Please change my contact information on the following Schwab account:

**Schwab Account Number**

- Would you like to update the account contact information for any closed account(s) on which you are an account holder? (In some instances, statements, tax documents, etc., can still be generated on a closed account.)  **Yes**  **No**
- Would you like to change the account contact information for accounts on which you are not the primary account holder?  **Yes**  **No**

If you have previously granted your Investment Advisor authority to change your address between two alternating mailing addresses, please submit a new Standing Instructions for Alternating Mailing Address Changes form to update the existing instructions.

**Name First**

**Middle**

**Last**

**Home/Legal Address Update** (The new address provided will replace the existing Home/Legal address. If left blank, the existing address will remain unchanged.)

**New Home/Legal Street Address** (P.O. boxes are not allowed.)

**City**

**State or Province**

**Zip/Postal Code**

**Country**

**Mailing Address Update** (select one): If no selection is made, mail will be sent to the Home/Legal address.

- Mailing address is the same as Home/Legal address** (The mailing address will be updated to match your Home/Legal address)
- Remove existing Mailing address without replacement** (Current Mailing address will be removed. No new address will be added)
- Keep existing Mailing address unchanged** (Maintain current Mailing address even if you replace the Home/Legal address)
- Replace existing Mailing address with a new address below** (Different from the Home/Legal address)

New Mailing Address (If different from Home/Legal; P.O. boxes may be used.)	City
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State or Province	Zip/Postal Code	Country
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**Phone Number Update** (select and complete all that apply): If left blank, existing phone numbers will remain unchanged.

- Remove Phone Number** (without replacement): **Note:** at least one contact phone number must be on file.

Remove Phone Number	Remove Phone Number	Remove Phone Number
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- Add New Phone Number** (New Phone Number will replace existing)

New Home Telephone Number	New Work Number	New Mobile Number
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**Email Address Update** (If left blank, existing email address will remain unchanged.)

**New Email Address\***

\* By providing your email address, you consent to receiving email from Schwab. Information about opting out of certain email communications is provided at [www.schwab.com/privacy](http://www.schwab.com/privacy).

By updating your contact information below, your customer record will be updated with the information provided. **Caution:** You may have multiple accounts associated with your customer record, including Individual, Trust, Corporations, etc. All accounts associated with your profile will be updated with the new contact information you have provided.

**Additional Account Holder/Co-Trustee/Authorized Agent/Minor/Co-Executor/Participant.** Please change my contact information on the following Schwab account:

**Schwab Account Number**

- Would you like to update the account contact information for any closed account(s) on which you are an account holder? (In some instances, statements, tax documents, etc., can still be generated on a closed account.)  Yes  No
- Would you like to change the account contact information for accounts on which you are not the primary account holder?  Yes  No

If you have previously granted your Investment Advisor authority to change your address between two alternating mailing addresses, please submit a new Standing Instructions for Alternating Mailing Address Changes form to update the existing instructions.

Name First	Middle	Last
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**Home/Legal Address Update** (The new address provided will replace the existing Home/Legal address. If left blank, the existing address will remain unchanged.)

New Home/Legal Street Address (P.O. boxes are not allowed.)	City
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State or Province	Zip/Postal Code	Country
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**Mailing Address Update** (select one): If no selection is made, mail will be sent to the Home/Legal address.

- Mailing address is the same as Home/Legal address** (The mailing address will be updated to match your Home/Legal address)
  - Remove existing Mailing address without replacement** (Current Mailing address will be removed. No new address will be added)
  - Keep existing Mailing address unchanged** (Maintain current Mailing address even if you replace the Home/Legal address)
  - Replace existing Mailing address with a new address below** (Different from the Home/Legal address)

**New Mailing Address** (If different from Home/Legal; P.O. boxes may be used.)

## **City**

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**State or Province**

**Zip/Postal Code**

## **Country**

**Phone Number Update** (select and complete all that apply): If left blank, existing phone numbers will remain unchanged.

- Remove Phone Number** (without replacement): **Note:** at least one contact phone number must be on file.

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## Remove Phone Number

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## Remove Phone Number

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## Remove Phone Number

- Add New Phone Number** (New Phone Number will replace existing)

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**New Home Telephone Number**

### New Mobile Number

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### New Work Number

**Email Address Update** (If left blank, existing email address will remain unchanged.)

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**New Email Address\***

\* By providing your email address, you consent to receiving email from Schwab. Information about opting out of certain email communications is provided at [www.schwab.com/privacy](http://www.schwab.com/privacy).

If you are receiving distributions from your retirement account, Schwab will apply state income tax withholding based on your legal address. If you move between states with differing state income tax laws, Schwab will apply state income tax withholding (as required) from your subsequent distributions based upon income tax withholding requirements for your new state of residence. Please contact your Investment Advisor for a copy of the State Income Tax Withholding Information sheet for specific information concerning your state's income tax withholding laws.

## **2. Organization/Pension Plan Account Information**

Please change the contact information on the following Organization/Pension Plan account(s):

- Would you like to update the account contact information for any closed account(s) owned by the Organization/Pension Plan? (In some instances, statements, tax documents, etc., can still be generated on a closed account.)  Yes  No

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**Organization/Pension Plan Name**

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**Tax ID Number**

**Street Address Update** (The new address provided will replace the existing Street address. If left blank, the existing address will remain unchanged.)

**New Street Address** (PO boxes are not allowed.)

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City

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**State or Province**

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**Zip/Postal Code**

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## Country

**Mailing Address Update:** (select one) If no selection is made, mail will be sent to the Legal Street address.

- Mailing address is the same as Street address** (The mailing address will be updated to match your Legal Street address)
- Remove existing Mailing address without replacement** (Current Mailing address will be removed. No new address will be added)
- Keep existing Mailing address unchanged** (Maintain current Mailing address even if you replace the Street address)
- Replace existing Mailing address with a new address below** (Different from the Street address)

New Mailing Address (If different from Street address; P.O. boxes may be used.) City \_\_\_\_\_

State or Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

**Phone Number Update** (select and complete all that apply): If left blank, existing phone numbers will remain unchanged.

- Remove Phone Number** (without replacement): **Note:** at least one contact phone number must be on file.

Remove Phone Number	Remove Phone Number	Remove Phone Number
<input type="checkbox"/> Add New Phone Number		

New Business Telephone Number \_\_\_\_\_

Email Address Update (If left blank, existing email address will remain unchanged.)

New Email Address\*

\* By providing your email address, you consent to receiving email from Schwab. Information about opting out of certain email communications is provided at [www.schwab.com/privacy](http://www.schwab.com/privacy).

### 3. Authorized Signatures

Only one account holder's signature is required to update the mailing address of the account.

**Note:** Accounts with multiple account holders, individuals will only be authorized to make updates of their respective customer record.

**X**  
Signature: Account Holder/Trustee/Authorized Agent Print Name \_\_\_\_\_ Today's Date (mm/dd/yyyy) \_\_\_\_\_

**X**  
Signature: Additional Account Holder/Co-Trustee/Authorized Agent Print Name \_\_\_\_\_ Today's Date (mm/dd/yyyy) \_\_\_\_\_

**X**  
Signature: Additional Account Holder/Co-Trustee/Authorized Agent Print Name \_\_\_\_\_ Today's Date (mm/dd/yyyy) \_\_\_\_\_

**X**  
Signature: Additional Account Holder/Co-Trustee/Authorized Agent Print Name \_\_\_\_\_ Today's Date (mm/dd/yyyy) \_\_\_\_\_

**X**  
Signature: Investment Advisor\* Print Name \_\_\_\_\_ Today's Date (mm/dd/yyyy) \_\_\_\_\_

\*Investment Advisor may sign if the account holder has granted a Standing Letter of Authorization (SLOA) for a specific address change.

To make account updates immediately, please visit [www.SchwabAlliance.com](http://www.SchwabAlliance.com) or ask your Advisor about electronic approval options.