

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):

- ☐ Account Holder Address (Complete Sections 1 and 3.)
 ☐ Organization/Pension Plan Address (Complete Sections 2 and 3.)
- ☐ Account Holder Phone Numbers (Complete Sections 1 and 3.)
 ☐ Organization/Pension Plan Phone Number (Complete Sections 2 and 3.)
- ☐ Account Holder Email Address (Complete Sections 1 and 3.)
 ☐ Organization/Pension Plan Email Address (Complete Sections 2 and 3.)
- ☐ Order new address imprinted on Schwab One® checks.

This change should take effect: ☐ Immediately ☐ Effective Date: _____

To make account updates immediately, please visit 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

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

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

New Home Telephone Number

New Work Number

New Mobile 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.

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

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

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

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

New Home Telephone Number

New Mobile Number

New Work 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.

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**

Organization/Pension Plan Name

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 (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 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

- ☐ **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.

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 or ask your Advisor about electronic approval options.