

Interested Party Request Form

1 GENERAL INSTRUCTIONS

Use this form to add, change or remove instructions for an interested party to receive copies of account related material such as statements, tax documents, and deposit confirmations. Please note that an interested party may also receive other types of correspondence such as newsletters, disclosures, etc.

2 ACCOUNTHOLDER INFORMATION

ACCOUNTHOLDER NAME

DATE OF BIRTH

SOCIAL SECURITY NUMBER

JOINT ACCOUNTHOLDER NAME

DATE OF BIRTH

SOCIAL SECURITY NUMBER

ACCOUNT NUMBER(S)

3 REQUEST TYPE & MAILING INSTRUCTIONS

INTERESTED PARTY #1

Is this Interested Party a *(select one)*:

- New Interested Party Designation?
- Update to an existing Interested Party Designation?
- Removal of an Interested Party Designation?

Mailing instructions for Interested Party #1:

INTERESTED PARTY NAME

COMPANY (IF APPLICABLE)

ADDRESS

APT/SUITE

CITY/STATE/ZIP

Elect documentation to be supplied to Interested Party #1:

- Supply all documentation
- Statements
- Tax documents
- Deposit confirmations

3 REQUEST TYPE & MAILING INSTRUCTIONS (CONT.)

INTERESTED PARTY #2

Is this Interested Party a *(select one)*:

- New Interested Party Designation?
- Update to an existing Interested Party Designation?
- Removal of an Interested Party Designation?

Mailing instructions for Interested Party #2:

INTERESTED PARTY NAME

COMPANY (IF APPLICABLE)

ADDRESS

APT/SUITE

CITY/STATE/ZIP

Elect documentation to be supplied to Interested Party #2:

- Supply all documentation
- Statements
- Tax documents
- Deposit confirmations

4 SIGNATURE(S)

All persons listed on the account(s) must sign.

ACCOUNTHOLDER SIGNATURE

DATE

JOINT ACCOUNTHOLDER SIGNATURE

DATE