

Legal Name Change Request

INSTRUCTIONS

This form should be completed by an Account Owner who has legally changed his or her name due to marriage, divorce, or other reasons. This request must be notarized or signature guaranteed, and only the Account Owner may authorize these changes. **A notary public, licensed by your state, can notarize your signature to verify that you are, in fact, the person signing this request.** An original Medallion Signature Guarantee may be obtained from an authorized officer at a brokerage firm or other financial institution. To change the name on an account, PENSCO Trust Company (PENSCO) requires a copy of the document indicating the name change (i.e. marriage certificate, court order, divorce decree, etc.). When completed, please return this form to PENSCO by mail, fax, or online upload through the PENSCO website. ALL FIELDS ARE REQUIRED.

1. Account Owner Information

Account Owner Name on File (first, mi, last)

PENSCO Account No.

Last four digits of SSN

Birth Date

Primary Phone

Mailing Address

City

State/Province

Country

ZIP Code

I also would like PENSCO to update my: Mailing Address Primary Phone

2. Authorization

As owner of the account referenced herein, I hereby authorize PENSCO to change the name on my account. I have also included a copy of official documentation supporting this name change to (print current name): _____.

SIGNATURES REQUIRED ON PAGE 2.

3. Signature(s)

Please sign both former name and current name as indicated, and obtain notaries or Medallion Signature Guarantee for current name.



Former Name



Current Name

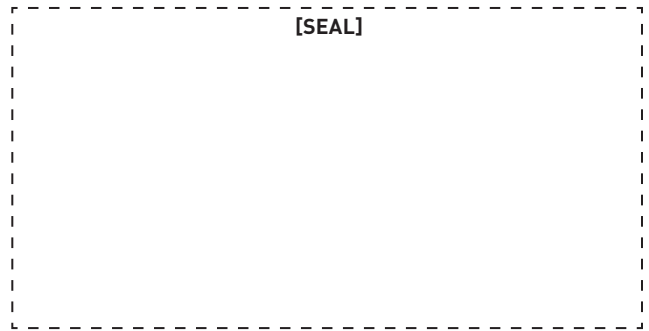
Date

State of

County of

The foregoing instrument was acknowledged this _____ day of _____, 20 _____ by _____ (name).

WITNESS my hand and official seal.



My commission expires _____ (date).



Notary Public Signature

PENSCO Trust Company performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity. Alternative investments are not FDIC insured and are subject to risk, including loss of principal.

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

Upload forms to:
www.pensco.com/upload

Fax to: 303-614-7038

Send mail to:
PENSCO
P.O. Box 173859
Denver, CO 80217-3859

For express deliveries:
PENSCO
1560 Broadway, Suite 400
Denver, CO 80202-3331

Questions?
Call 800-962-4238
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