



Subsidiary of D.J. St. Germain Co., Inc.

Change of Address Form

Use this form to update a legal/permanent address, mailing address and/or email address.

Name(s): _____

Account # (s): - -

- -

New Legal/Permanent Address (Must not be a P.O. Box)

Address 1: _____

Address 2: _____

City, State, and Zip: _____

New Phone #: _____

New Email Address: _____

If legal address change affects tax reporting for an IRA, please contact Client Service.

New Mailing Address (If different from Legal/Permanent Address)

Address 1: _____

Address 2: _____

City, State, and Zip: _____

It is the client's responsibility to notify St. Germain when a seasonal or temporary mailing address needs to be changed back to their primary address.

All account owners must sign and date below:

X _____ Date: _____

X _____ Date: _____

St. Germain use only

- Account Manager notified of state change (if applicable) by: _____ Date: _____
- New IRA Distribution needed? No Yes attached sent to client by: _____ Date: _____
- Salesforce Updated by: _____ Date: _____
- Axys Main Address entered by: _____ Date: _____
- Pershing updated by: _____ Date: _____