

Fidelity

Change of Address Form

Minimum Requirements

1. List account holder's information in Section 1
 - a. First, Middle Initial, and Last Name
 - b. Fidelity Account number(s) to which new address is applicable
2. Complete all boxes for New Permanent and/or Mailing Address for the accounts in Section 2.
3. If the new Physical/Mailing address of the account owner(s) is the same as the new Permanent and/or Mailing Address for the account, check the box in Section 2 to "Update all owners' address(es) with same address(es)". If not, complete sections 3 and 4 as appropriate.
4. If necessary, complete all boxes for New Permanent and/or Mailing Address for the account owners in Sections 3 and 4.
5. Client must Print Name and physically sign and date in Section 5.
6. Form must be saved and sent to scoperations@marinerwealthadvisors.com

FIDELITY

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Frequently Asked Questions

- Q: We will be going to Florida to stay for the winter, what do we need to do?
- A: You should change the mailing address on your account to your Florida address. When you return to your permanent address, please let us know and we can change it back.
- Q: I received a call/letter that my account is restricted because of a bad address but I haven't moved, what do I do?
- A: Occasionally mail gets returned to Fidelity by the United States Postal System. In order to keep your account number and other personal information confidential, Fidelity restricts the account until we verify the correct address. Please call our office at 888-797-6161 or email us at scoperations@marinerwealthadvisors.com and let us know that you have not moved.