Print Reset

Fidelity INVESTMENTS

Name Change

Use this form to notify Fidelity that your name has changed. Type on screen or fill in using CAPITAL letters and black ink.

Helpful to Know

- You MUST attach a photocopy of a marriage certificate, divorce decree or other court document showing your new name.
- Adding, changing, or removing a suffix (ex., Jr. or Sr.) also requires supporting documentation.
- To make any other changes to your account (such as from an individual to a joint account), contact your Authorized agent/Advisor.
- If you have the ability to write a check on any Fidelity account (even if you've never written one), you must also complete a Checkwriting form for that account. **ALL owners on the account who have checkwriting must sign, even if only one name has changed.**
- If you have a debit card on any Fidelity account, you can elect below to have that card reissued with your new name.

Authorized agent/Advisor

Firm Name	G Number
MARINER WEALTH ADVISORS	G 1 1 0 6 7 1 6 2

1. Account Owner

Be sure to include proper documentation (see above).

We will change your name on ALL accounts within Fidelity, except your employer-sponsored accounts.

Former Name

First Name	Middle Name	Last Name

Social Security/Taxpayer ID Number

New Name

First Name	Middle Name	Last Name

☐ Reissue my existing debit card(s) with my new name.

2. Signature and Date *Account owner must sign with your NEW name and date.*

By signing below, you:
- Authorize Fidelity to act on all instructions given on this form.
- Accept all terms and conditions described in this form.
- Certify that all information you provided is correct to the best of your knowledge.

Print Owner Name *First, M.I., Last*	
Owner Signature	Date *MM - DD - YYYY*
SIGN	