

# Schwab

## *Change of Address Form*

### Minimum Requirements

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1. Above Section 1, select type of change (normally will be Account Holder Address) and choose when the address change should begin
2. In Section 1, complete separate account holder information for each individual owner or trustee on the accounts where the address will change
  - a. Schwab Account number(s)
  - b. First Name, Middle Initial, Last Name
  - c. New Home Legal Address – Street, City, State, ZIP Code (No P.O. Box allowed)
  - d. New Mailing Address if there is a P.O. Box or mailing address is different from the New Home Legal Address
  - e. New Home, Business, and/or Cell numbers
3. All clients listed in Section 1 must Print/Sign Name and date in Section 4
4. Form must be saved and sent to [scoperations@marinerwealthadvisors.com](mailto:scoperations@marinerwealthadvisors.com)

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## Frequently Asked Questions

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- 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 Schwab by the United States Postal System. In order to keep your account number and other personal information confidential, Schwab restricts the account until we verify the correct address. Please call our office at 888-797-6161 or email us at [scoperations@marinerwealthadvisors.com](mailto:scoperations@marinerwealthadvisors.com) and let us know you have not moved.