

Change of Address Form

Investment Advisor ("IA") Information (This portion to be completed by IA.)

IA Firm Name *(Please print.)*

IA Master Account Number Service Team

IA Contact Name *(if follow-up is required)* IA Telephone Number IA Email Address

- For Trust Accounts, the address for the Trust must match the address of one of the trustees.
- For changes requiring a c/o address for a third party, please use the Third-Party Representative Address Authorization Form.
- If you are changing a U.S. address to an international address, please contact your service team; additional documentation may be required.

Type of Change (Please select all that apply.):

Account Holder Address *(Complete Sections 1 and 3.)* Account Holder Phone Number *(Complete Sections 1 and 3.)*

Organization/Pension Plan Address *(Complete Sections 2 and 3.)* Order new address imprinted on Schwab One® checks.

This change should take effect: Immediately Effective Date: _____

To make account updates immediately, please visit www.SchwabAlliance.com or ask your Advisor about electronic approval options.

1. Account Holder Information

By updating your address below, your customer record will be updated with the information provided. **Caution:** You may have multiple accounts associated with your customer record, including Individual, Trust, Corporations, etc. All accounts associated with your profile will be updated with the new address you have provided.

Account Holder/Trustee/Authorized Agent/Custodian/Executor. Please change my address on the following Schwab account:

Schwab Account Number

- Would you like to update the account address for any closed account(s) on which you are an account holder? (In some instances, statements, tax documents, etc., can still be generated on a closed account.) Yes No
- Would you like to change the account address for accounts on which you are not the primary account holder? Yes No

If you have previously granted your Investment Advisor authority to change your address between two alternating mailing addresses, please submit a new Standing Instructions for Alternating Mailing Address Changes form to update the existing instructions.

Name *First* *Middle* *Last*

Home/Legal Street Address *(P.O. boxes are not allowed.)* City

State or Province Zip/Postal Code Country

Mailing Address *(If different from above; P.O. boxes may be used.)* City

State or Province	Zip/Postal Code	Country
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Home Telephone Number	Business Telephone Number	Cellular Telephone Number
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By updating your address below, your customer record will be updated with the information provided. **Caution:** You may have multiple accounts associated with your customer record, including Individual, Trust, Corporations, etc. All accounts associated with your profile will be updated with the new address you have provided.

Additional Account Holder/Co-Trustee/Authorized Agent/Minor/Co-Executor/Participant. Please change my address on the following Schwab account:

Schwab Account Number

- Would you like to update the account address for any closed account(s) on which you are an account holder? (In some instances, statements, tax documents, etc., can still be generated on a closed account.) **Yes** **No**
- Would you like to change the account address for accounts on which you are not the primary account holder? **Yes** **No**

If you have previously granted your Investment Advisor authority to change your address between two alternating mailing addresses, please submit a new Standing Instructions for Alternating Mailing Address Changes form to update the existing instructions.

Name <i>First</i>	<i>Middle</i>	<i>Last</i>
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Home/Legal Street Address <i>(P.O. boxes are not allowed.)</i>	City
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State or Province	Zip/Postal Code	Country
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Mailing Address <i>(If different from above; P.O. boxes may be used.)</i>	City
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State or Province	Zip/Postal Code	Country
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Home Telephone Number	Business Telephone Number	Cellular Telephone Number
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If you are receiving distributions from your retirement account, Schwab will apply state income tax withholding based on your legal address. If you move between states with differing state income tax laws, Schwab will apply state income tax withholding (as required) from your subsequent distributions based upon income tax withholding requirements for your new state of residence. Please contact your Investment Advisor for a copy of the State Income Tax Withholding Information sheet for specific information concerning your state's income tax withholding laws.

2. Organization/Pension Plan Account Information

Please change the address on the following Organization/Pension Plan account(s):

- Would you like to update the account address for any closed account(s) owned by the Organization/Pension Plan? (In some instances, statements, tax documents, etc., can still be generated on a closed account.) **Yes** **No**

Organization/Pension Plan Name **Tax ID Number**

Organization/Pension Plan Street Address (P.O. boxes are not allowed.) **City**

State or Province **Zip/Postal Code** **Country**

Organization/Pension Plan Mailing Address (if different from above) **City**

State or Province **Zip/Postal Code** **Country**

Business Telephone Number

3. Authorized Signatures

All Schwab account holders listed in Section 1 must sign and date.

Note: The signature of only one Authorized Agent of an Organization is required to update the address in Section 2.

X _____

Signature: Account Holder/Trustee/Authorized Agent **Print Name** **Today's Date (mm/dd/yyyy)**

X _____

Signature: Additional Account Holder/Co-Trustee/Authorized Agent **Print Name** **Today's Date (mm/dd/yyyy)**

X _____

Signature: Additional Account Holder/Co-Trustee/Authorized Agent **Print Name** **Today's Date (mm/dd/yyyy)**

X _____

Signature: Additional Account Holder/Co-Trustee/Authorized Agent **Print Name** **Today's Date (mm/dd/yyyy)**

X _____

Signature: Investment Advisor* **Print Name** **Today's Date (mm/dd/yyyy)**

*Investment Advisor may sign if the account holder has granted a Standing Letter of Authorization (SLOA) for a specific address change.

To make account updates immediately, please visit www.SchwabAlliance.com or ask your Advisor about electronic approval options.