



# Second Name Letter/ Name Change Form

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

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IA Firm Name *(Please print.)*

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IA Master Account Number Service Team

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

Please complete this form if you are known by or have used any other name(s). You may also use this form to request a name change.

**1. Account Holder Information**

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Eight-Digit Schwab Account Number(s) *(List all affected account numbers.)*

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Account Holder's First Middle Last

**2. Other Names**

If you are known by any other name(s), please complete the information below with the corresponding signature(s).

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First Middle Last

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Signature *(Sign as indicated above.)*

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First Middle Last

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Signature *(Sign as indicated above.)*

**3. Name Change**

To request a name change, please complete the information below and include verification of the name change (a copy of a Certified Marriage Certificate, Certified Divorce Decree, or other Certified Court Document).

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Former Name First Middle Last

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New Name First Middle Last

**4. Please Read, Sign, and Date**

I authorize Charles Schwab & Co., Inc. to carry my account and register my securities in the following name:

**X** \_\_\_\_\_

Today's Date *(mm/dd/yyyy)*

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Print Name