



# Update/Change Account Information Form

When completed, please return this form to Directed IRA via mail, fax, email, or secure file upload. Only the Account Owner may authorize these changes.

- I am updating my mailing address. (You must maintain a physical address on file)
- I am updating my physical address.
- I am updating my email address.
- I am updating my phone number.
- I am updating my name\*.
- I am updating paper statement, add/remove.

## 1. Account Owner Information

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_

Last four digits of SSN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Phone Number: \_\_\_\_\_

Please list all Directed IRA Account Number(s) to update:

|  |  |
|--|--|
|  |  |
|  |  |

### New Mailing Address (you must provide a physical address if a PO Box)

New Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Country: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### New Physical Address (you must maintain a current physical address on file)

New Physical Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Country: \_\_\_\_\_ Zip Code: \_\_\_\_\_

### New Email Address (Account statements are sent to this email address quarterly)

New Email Address (Please print or type clearly): \_\_\_\_\_

### New Phone Number

New Primary Phone: \_\_\_\_\_ New Secondary Phone: \_\_\_\_\_

### Paper Statements

- Please ADD Paper Statements to my Account(s) listed above. (\$20 annual fee will apply)
- Please REMOVE Paper Statements from my Account(s).

### New Name\*

\*If the Account Owner has legally changed his or her name due to marriage, divorce, or other reasons, this request must be notarized. Only the Account Owner may authorize these changes. **A notary public, licensed by your state, can notarize your signature to verify that you are, in fact, the person signing this request.** A copy of the document indicating the name change must be returned with this form. (i.e. marriage certificate, court order, divorce decree, etc.) When completed, the original document must be mailed to Directed IRA.

New Name First: \_\_\_\_\_ M.I.: \_\_\_\_\_ Last: \_\_\_\_\_

**2. Authorization**

As owner of the account referenced herein, I hereby authorize Directed IRA to update/change the information as indicated above on my account. I have also included a copy of official documentation supporting the name change, if applicable.

➤ \_\_\_\_\_  
Account Owner Signature \_\_\_\_\_  
Date

**3. Notarized Signature**

Only applicable if you are changing the name on your account. You must include supporting documentation indicating the name change (i.e. marriage certificate, court order, divorce decree, etc.) When completed, this original signed form along with copies of supporting documentation must be mailed to Directed IRA.

Please sign both former name and current name as indicated and obtain Notary Signature for current name.

➤ \_\_\_\_\_  
**Former Name Signature**

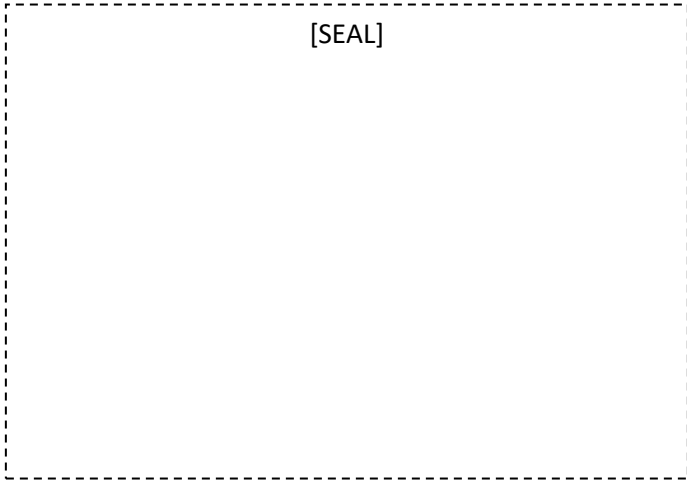
➤ \_\_\_\_\_  
**Current Name Signature**

\_\_\_\_\_  
Date

STATE OF \_\_\_\_\_)

COUNTY OF \_\_\_\_\_)

The foregoing instrument was acknowledged this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by  
\_\_\_\_\_  
(Account Owner Current Name).



**WITNESS my hand and official seal.**

➤ \_\_\_\_\_  
Notary Public Signature

My commission expires \_\_\_\_\_

**INVESTMENTS: NOT FDIC INSURED ■ NO GUARANTEE ■ MAY LOSE VALUE**

[Secure File Upload](#)

Email Forms to:  
[Clients@directedira.com](mailto:Clients@directedira.com)

Send Mail to:  
3033 N. Central Ave. Ste. 415  
Phoenix, AZ 85012

Fax:  
(602) 899-9641

Directed IRA is a tradename of Directed Trust Company, an Arizona Corporation