

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 physical address. I am updating my name*.
- I am updating my email address. I am updating paper statement. (Add or Remove)
- I am updating my phone number. I am updating my mailing address. (You must maintain a physical address on file)

1. Account Owner Information

First Name: _____ MI: _____ Last Name: _____
Last 4 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: _____ Country: _____ Zip: _____

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

New Physical Address: _____
City: _____ State: _____ Country: _____ Zip: _____

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: _____ 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](http://www.directedira.com/secureupload)
www.directedira.com/secureupload

Email Forms to:
Clients@directedira.com

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

Phone: (602) 899-9396
Fax: (602) 899-9641

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