

# Brokerage Notice of Name Change



Use this form to change your name on American Century Investments® brokerage account(s). You must attach a copy of one of the following:

- **Unexpired REAL ID compliant driver's license or identification card.** A standard driver's license or identification card without REAL ID markings will not be accepted.
- **Unexpired government-issued passport**
- **Marriage certificate** showing former and new names and date of marriage
- **Divorce decree** that states a name change was granted and includes a court seal
- **Court order** or other legal documentation referencing the former and new names (not an application)
- **Social Security card**

If supporting documentation is not included, we will not be able to make this change.

## 1 Provide Your Account Information

4MV-

Owner's first name

Middle initial

Owner's last name

Owner's Tax ID number or U.S. Social Security number

Owner's date of birth (month-day-year)

Telephone number (daytime)

Telephone number (evening)

If your name appears on account number(s) not registered under the Tax ID number or Social Security number above, please list the account number(s) below.

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## 2 Submit Your Name Change

**Former name:**

Owner's first name

Middle initial

Owner's last name

**New legal name:**

Owner's first name

Middle initial

Owner's last name

**As a result of:**

Check one:  Marriage  Divorce  Other

Date change is effective (month-day-year)

### 3 Submit Your Change of Address

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If your address has changed, please complete the following information.

Street Apt. / Unit / PMB

City State ZIP

Telephone number (daytime) Telephone number (evening)

Date new address is effective (month-day-year)

### 4 Update Your Investor Services

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Forms are available at [americancentury.com](http://americancentury.com)

- Complete a *Brokerage Investment and Redemption Form* to update your bank information on your accounts.
- For CheckWriting Services:
  - Standard Brokerage Accounts - complete a *Brokerage Checkwriting Service Authorization* form
  - Corestone Accounts® - complete a *Brokerage Corestone Account Application*
- Review any retirement or transfer on death (TOD) beneficiary designations. To make changes, complete a new form.
  - For IRAs - complete a *Brokerage IRA Designation of Beneficiary* form
  - For TOD accounts - complete a *Brokerage Individual Transfer on Death Account Agreement* or *Joint Transfer on Death Account Agreement*

### 5 Sign Your Name and Date Below

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Please sign your new name below.

I certify that:

- I am of legal age.
- My name appears on the registration in all account(s) registered under the Tax ID number or Social Security number in step 1, and other accounts listed, if any.



Signature

Date