



Address Change Request

IMPORTANT INFORMATION

Use this form to change the address of record for an account(s). Only the Account Owner may complete this form and authorize these changes. This information will be used to update our records for each of your accounts in the case of multiple accounts held with Pacific Premier Trust.

*All information in section 1 is required to complete request.

1. ACCOUNT OWNER INFORMATION

ACCOUNT OWNER NAME (FIRST, MI, LAST)

SSN

DATE OF BIRTH

ACCOUNT NO.

PRIMARY PHONE

OTHER PHONE

EMAIL ADDRESS

2. MAILING ADDRESS

OLD MAILING ADDRESS

CITY

STATE/PROVINCE

COUNTY

POSTAL CODE

NEW MAILING ADDRESS (IF P.O. BOX, PROVIDE LEGAL PHYSICAL ADDRESS BELOW)

CITY

STATE/PROVINCE

COUNTY

POSTAL CODE

3. LEGAL PHYSICAL ADDRESS

- Required if different from mailing address, or if P.O. Box is provided above as mailing address.

Legal Physical address same as mailing

LEGAL PHYSICAL ADDRESS

CITY

STATE/PROVINCE

COUNTY

POSTAL CODE

4. TAX RESIDENCY

Please indicate which State you reside in for tax reporting purposes.

STATE

CONTINUED ON NEXT PAGE



NOTE: Generally, mutual fund sponsors will accept instructions from you and/or your Financial Representative to update their records so you may continue to receive third party statements from the fund(s). Pacific Premier Trust does not automatically notify fund companies when provided with an address change. Please contact fund companies directly to update your address. If a fund company requires instructions from Pacific Premier Trust, attach a separate sheet for each account with mutual fund names and account numbers (provide separate sheets if you have multiple accounts with Pacific Premier Trust that require updating). Pacific Premier Trust will contact those companies to provide the appropriate authorization to update their records with your new address.

*Please physically sign form or attach electronic signature verification page.

	ACCOUNT OWNER SIGNATURE	DATE (REQUIRED)
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NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.

Upload forms to:
PacificPremierTrust.com/upload
Fax to: 303-614-7086

Send mail to:
Pacific Premier Trust
Processing Center
PO BOX 981012
Boston, MA 02298

For express deliveries:
FIS-Remittance Processing
Loading Dock #2
Attn: Pacific Premier Trust
10 Dan Road
Canton, MA 02021

Questions?
Call 800-962-4238

