



# Legal Name Change Request

## IMPORTANT INFORMATION

**NOTE:** This form should be completed by an Account Owner who has legally changed his or her name due to marriage, divorce, or other reasons. This request must be notarized and 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.**

**\*To change the name on an account, Pacific Premier Trust requires a copy of the document indicating the name change (i.e. marriage certificate, court order, divorce decree, etc.).**

When completed, please return this form to Pacific Premier Trust by mail, fax, or online upload at PacificPremierTrust.com/upload.

All fields are required.

### 1. ACCOUNT OWNER INFORMATION

ACCOUNT OWNER NAME (FIRST, MI, LAST)		PACIFIC PREMIER TRUST ACCOUNT NO.	
FULL SSN	DATE OF BIRTH	PRIMARY PHONE	
LEGAL ADDRESS			
CITY	COUNTY	STATE/PROVINCE	POSTAL CODE

I also would like Pacific Premier Trust to update my:  Mailing Address  Primary Phone No.

Reason for Name Change:

- Marriage (requires copy of the marriage certificate)
- Divorce (requires copy of the Divorce decree)
- Name change by Court Decree (requires accompanying certified court document outlining name change)
- Other

### 2. AUTHORIZATION

As owner of the account referenced herein, I hereby authorize Pacific Premier Trust to change the name on my account. I have also included a copy of official documentation supporting this name change to: \_\_\_\_\_

**SIGNATURES REQUIRED ON NEXT PAGE**



**3. SIGNATURES**

Please sign both former name and current name as indicated, and obtain notaries or Medallion Signature Guarantee for current name.

▶ FORMER NAME

▶ CURRENT NAME

**NOTARY ACKNOWLEDGMENT**

State of \_\_\_\_\_; County of \_\_\_\_\_

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, \_\_\_\_\_

a Notary Public in and for said County and State, personally appeared (Name): \_\_\_\_\_

personally known to me (or proved to me on the basis of satisfactory evidence) to be the person whose name is subscribed to the instrument and acknowledged to me that he/she executed the same in his/her authorized capacity, and that by his/her signature on the instrument the person, or the entity on behalf of which the person acted, executed the instrument.

WITNESS my hand and official seal.

[SEAL]

My commission expires: \_\_\_\_/\_\_\_\_/\_\_\_\_

▶ NOTARY PUBLIC SIGNATURE DATE (REQUIRED)

Pacific Premier Trust performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity.

**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](http://PacificPremierTrust.com/upload)  
Fax to: 303-614-7038

Send mail to:  
Pacific Premier Trust  
Processing Center  
P.O. 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

