



Legal Name Change Request

Toll Free: 800-962-4238
www.PacificPremierTrust.com

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 or signature guaranteed, 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. An original Medallion Signature Guarantee may be obtained from an authorized officer at a brokerage firm or other financial institution. 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 www.PacificPremierTrust.com/upload. All fields are required.

1 ACCOUNT OWNER INFORMATION

Form with fields: ACCOUNT OWNER NAME (FIRST, MI, LAST)*, PACIFIC PREMIER TRUST ACCOUNT NO., LAST 4 DIGITS OF SSN*, DATE OF BIRTH*, PRIMARY PHONE*, MAILING ADDRESS, CITY, COUNTY, STATE/PROVINCE, POSTAL CODE

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

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.

My commission expires: ____ / ____ / ____



NOTARY PUBLIC SIGNATURE

DATE

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:
www.PacificPremierTrust.com/upload

Send mail to:
Pacific Premier Trust
Processing Center
P.O. Box 173859
Denver, CO 80217-3859

For express deliveries:
Pacific Premier Trust
Processing Center
1560 Broadway, Suite 400
Denver, CO 80202-3331

Questions?
Call 800-962-4238

Fax to: 303-614-7038