

CHANGE OF DEALER AND REPRESENTATIVE AUTHORITY

Use this form to change the Registered Representative on your account.

ACCOUNT OWNERSHIP (please print)

Account Owner's Name	Daytime Phone Number
SSN or Tax ID	E-mail Address
Fund Name /Account Number	
Fund Name /Account Number	
Fund Name /Account Number	
Fund Name /Account Number	

☐ Update all accounts under SSN/Tax ID

AUTHORIZATION

I/We authorize the Funds to change the accounts listed above or all accounts under the provided SSN#/Tax ID as follows:

☐ Change To:

Dealer Name	Dealer Number	
Branch Name	Branch Number	
Branch Address		
City	State	Zip
Representative Name	Rep Number	
Representative Telephone Number		

SIGNATURE(s) (required)

X Signature of Account Owner	X Signature of Joint Owner (if any)
Date	Date
X Signature of Resigning Representative*	X Signature of New Dealer
Date	Date

*The resigning rep signature is only needed in certain scenarios.