

Investment Advisor ("IA") Information (This portion to be completed by IA.)

IA Firm Name (please print): _____
IA Master Account Number: _____ Service Team: _____

1. Account Information

I authorize Charles Schwab & Co., Inc. to change my address on the following Schwab account(s):

Account Number _____ Account Number _____
Account Number _____ Account Number _____

This change should take effect: Immediately Effective Date: _____

2. New Address Information*

Type of address change (select all that apply):

- Account Mailing Address
- Authorized Agent Address
- Duplicate Statements for Interested Party

Organization/Trust Name _____

Account Holder/Authorized Agent First Name _____ Middle _____ Last _____

Additional Account Holder First Name _____ Middle _____ Last _____

Street Address _____

City _____ State _____ Zip Code _____

Home Telephone _____ Business Telephone _____

Order new address imprinted on Schwab One® checks.

3. Legal Address*

You must complete this section if your new mailing address is a P.O. box number. Please provide your legal address below.

A P.O. box is not acceptable as a legal address.

Legal Address _____

City _____ State _____ Zip Code _____

4. Authorized Signatures

All authorized persons of the accounts listed above must sign (e.g., primary holder, joint tenants, trustees, co-trustees):

▶ Signature: Account Holder/Trustee/Authorized Agent _____ Print Name _____ Date _____ (mm/dd/yyyy)

▶ Signature: Additional Account Holder/Co-Trustee/Authorized Agent _____ Print Name _____ Date _____ (mm/dd/yyyy)

▶ Signature: Additional Account Holder/Co-Trustee/Authorized Agent _____ Print Name _____ Date _____ (mm/dd/yyyy)

▶ Signature: Additional Account Holder/Co-Trustee/Authorized Agent _____ Print Name _____ Date _____ (mm/dd/yyyy)

*If you are receiving distributions from your Retirement Account, Schwab will apply state income tax withholding based on your Legal Address. If no Legal Address is on file, your Mailing Address will be used. If you move between states with differing state income tax laws, Schwab will apply state income tax withholding (as required) from your subsequent distributions based upon income tax withholding requirements for your new state of residence. Please contact your Investment Advisor for a copy of the State Income Tax Withholding Information sheet for specific information concerning your state's income tax withholding laws.

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