

1 ADDRESS / PHONE / EMAIL CHANGE – To change an address, phone or email, complete section **1** or enter www.legendgroup.com, click on **Client Accountlink**, log in or, if a first time user, register to establish a user ID and password. Click on **My Information** then **My Account Update**.

Participant/Client _____
Print Name SS# or Tax ID

Daytime Phone _____ **Evening Phone** _____ **E-mail Address** _____

Address on file _____
(Before change) Address City ST Zip + 4

New Mailing _____
Address or *PO Box City ST Zip + 4

*If your mailing address is a PO Box, by law we are required to have a residence address on file. Provide below.

Residence _____
Address Apt. # City ST Zip + 4

➔ **Participant signature required:** _____ **Date:** _____

Complete if the new address also applies to a spouse/joint account. _____
Spouse / Joint SS# or Tax ID

X _____
Spouse/Joint Signature required Spouse/Joint email address Daytime phone

Complete if the new address applies to any other accounts you have, such as a 529 or UGMA for a minor.

_____ SS# or Tax ID of _____ SS# or Tax ID _____ SS# or Tax ID

Complete if the new address applies to your beneficiary(ies) and Legend is the Custodian.

_____ Beneficiary Name _____ Beneficiary Name _____ Beneficiary Name _____ Beneficiary Name

2 NAME CHANGE – A **COPY OF A COURT DOCUMENT** authorizing the name change is required, e.g., marriage license, divorce order, death certificate. **Do not send original.** Name changes cannot be done online.

The following name change applies to: [] Participant - SS# or Tax ID _____
[] Spouse/Joint - SS# or Tax ID _____

Reason for name change: [] Marriage [] Divorce [] Widow [] Other _____

Print previous name _____

Print new name _____

Previous signature **X** _____

New signature **X** _____

Date: _____

Mail to: The Legend Group, Operations Support, PO Box 32427, Palm Beach Gardens, FL 33420-9974
Fax to: 561-537-4380 Questions: Operations Support at 561-694-0110 www.legendgroup.com

Legend Use Only: Processor & date _____ Signature: [] OK [] No PW
Principal _____ Rep License: [] OK [] 812 Notes: _____