

**PRIMERICA SHAREHOLDER SERVICES  
NAME CHANGE FORM  
(This page retained by the client)**

**Instructions**

Complete the attached Name Change Form

Sign this form

Mail the completed, signed form to:

Primerica Shareholder Services  
P.O. Box 534485  
Pittsburgh, PA 15253 – 4485

**You may use this form to change the name on your account to a new legal name. You must include your account number so that we may process your name change.**

You must submit with this completed form and include a certified copy of the legal document that changed your name (i.e. Divorce Decree, Marriage Certificate, etc). The legal document you provide may be a copy, but the document must have one of the following: 1) court seal, 2) a stamp from the clerk of the court, 3) or the document may be certified by a notary public. In order for PSS to accept a copy of the legal document, we must be able to see for verification purposes, the court seal, the clerk of the court stamp, or the notary public stamp.

**Section 1 .** Please print your new and former name. Please sign your new and former name.

**Section 2 – Tax Identification Number (TIN) Certification**

You must provide your Tax ID Number and sign this section for certification of your TIN.

**Section 3 .** Please note that a notary seal must be provided in the authorization section 3 of the form in order that PSS may process your request.

**Note:** If Check Writing Privileges is offered by your fund and you currently have Check Writing Privileges for your account, you must complete the Check Writing Signature Authorization Form. You may obtain this form by contacting Primerica Shareholder Services at 1-800-544-5445. Customer Service Representatives are available to assist you Monday through Friday between 8 a.m. and 8 p.m. ET.

SSN #: \_\_\_\_/\_\_\_\_/\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

**PRIMERICA SHAREHOLDER SERVICES**

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Account Number:

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1. **Change of name due to marriage, divorce, or other.** Please sign below in **your new and former name** and provide certification of the name change.

\_\_\_\_\_ is one and the same as, \_\_\_\_\_  
Print New Name Print Former Name

\_\_\_\_\_  
New Name (Signature)

\_\_\_\_\_  
Former Name (Signature)

2. **You must provide your Tax Identification Number (SSN/TIN) below and complete by signing this section.**

Tax Identification Number (SSN/TIN):

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I certify under penalties of perjury (1) that the Social Security Number provided on this form is the correct Taxpayer Identification Number, (2) that I am not subject to backup withholding either because I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of failure to report all interest or dividends, or the IRS has notified me that I am no longer subject to backup withholding, (3) that I am a U.S. Person (including a U.S. resident alien) and \*(4) The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

\_\_\_\_\_  
Owner's Signature

\_\_\_\_\_  
Date

\* Not applicable as Primerica Shareholder Services is not a foreign financial institution.

3. **Use the space below for Notary Seal.** Your signature must be witnessed by a Notary Public.

\_\_\_\_\_  
Notary Seal/Stamp