



Change Your Legal Name

www.schwab.com 1-800-435-4000 (inside the U.S.) +1-415-667-8400 (outside the U.S.) 1-888-686-6916 (multilingual services)

- Use this form to notify us that your name has changed because of marriage, divorce, or another reason. We'll update all accounts registered under the Social Security or Individual Taxpayer Identification Number that you provide.
- If your intent is not to change your name but to allow Schwab to accept checks or securities under your alias, please complete the **Add an Alias ("Second Name") to Your Account** form; for assistance, please contact Schwab.
- Please complete Sections 1, 2, and 4 of this form and **include supporting documentation from the list in Section 2 for verification.**
- Please complete Section 3 if you have existing checking or debit card features on your account and would like to receive a new card and/or checks with your updated name.
- **If your address or phone number/contact information is changing, please contact Schwab or log in to www.Schwab.com to update your account.**

1. Account Holder Information
 If you have multiple accounts, enter one account number and all of your Schwab accounts will be updated except your employer-sponsored accounts.

Schwab Account Number _____ Former Name on Account(s) As It Appears on Your Statement(s) _____

2. Name Change
 I have legally changed my name. I authorize Charles Schwab & Co., Inc. to carry my account(s) and register my securities in the following name:

New Legal Name *First* _____ *Middle* _____ *Last* _____

Check a box below to indicate which supporting document(s) you are providing. **A court stamp must be clearly visible on all supporting documents.**

A marriage certificate

A divorce decree or court order referencing the name change

A petition for a name change and a copy of your valid driver's license or state-issued photo ID

A certificate of naturalization and a copy of your valid driver's license or state-issued photo ID

Other court document(s)

3. Reissue Checks and/or Debit Card (Select one or both, if applicable.)
 If your account **does not** already have checking or debit card features, please log in to www.schwab.com and go to **Service** then **Forms** to see if your account is eligible, or call Schwab for assistance.

Please issue new checks in my updated name to my address of record.

Please issue a new debit card in my updated name to my address of record.

4. Please Sign and Date This Authorization. Please sign and date in blue or black ink only. Your signature will also serve as a signature card.

Signatures and Dates Required

X _____
 Signature: Account Holder (Former Name) Print Name Today's Date (mm/dd/yyyy)

X _____
 Signature: Account Holder (New Legal Name) Print Name Today's Date (mm/dd/yyyy)

5. Return Instructions

- **Upload** online with secure messaging (if you are an existing client and have online access to your account).

1. Go to www.schwab.com and log in to your account.
2. Click Message Center (under Service), and then click Upload Document.

- **Fax** to 1-888-526-7252.

- **Bring** to your nearest Schwab branch (visit www.schwab.com/branch for locations).

- **Mail** to any of the following addresses:

Regular Mail (West)

Charles Schwab & Co., Inc.
P.O. Box 982600
El Paso, TX 79998-2600

Regular Mail (East)

Charles Schwab & Co., Inc.
P.O. Box 628291
Orlando, FL 32862-8291

Overnight Mail (West)

Charles Schwab & Co., Inc.
1945 Northwestern Drive
El Paso, TX 79912

Overnight Mail (East)

Charles Schwab & Co., Inc.
1958 Summit Park Dr., Ste. 200
Orlando, FL 32810