

(888) 205 - 6036 (505) 212 - 0494 operations@horizontrust.com

Horizon Trust Correspondence, PO BOX 27068, Newark NJ 07101

This name change request must be notarized or signature guaranteed. This form should be completed by an Account Owner who has legally changed his or her name due to marriage, divorce, or other reasons. Only the Account Owner may authorize these changes. A notary public, licensed by your state, can notarize your signature to verify that you are, in fact, the person signing this request. A Medallion signature guarantee may be obtained from an authorized officer at a brokerage firm or other financial institution.

PART 1. ACCOUNT OWNER INFORMATION

First Name:	M.I.:	Last Name:	Account #:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last 4 SSN Digits:	Date of Birth: (MM/DD/YYYY)	Email Address:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

PART 2. REASON FOR NAME CHANGE

Select a reason below for the name changes, and then follow the instructions for additional documentation. Additional documentation may be required for other types of name changes, as well as a signed Letter of Instruction providing the reason for the name change.

- Marriage** - Enclose a copy of the marriage certificate.
- ! If you are unable to provide a copy of the marriage certificate, include a copy of a valid driver's license or Social Security Card with the new name.
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- Divorce** - Enclose a copy of the divorce decree.
- ! Divorce decree must state the name change.
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- Naturalization** - Enclose a copy of the naturalization document clearly displaying former and new name.
- ! If the document does not reflect both names, please also provide a copy of a birth certificate or passport with the former name.
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- Other:** (Select an option below)
- Official name change by court decree** - Enclose a certified court decree of the name change.
- Official name change by adoption** - Enclose a certified decree of the adoption.

PART 3. NAME CHANGE INFORMATION

Former Legal Name

Title:	First Name:	M.I.:	Last Name:	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

New Legal Name

Title:	First Name:	M.I.:	Last Name:	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PART 4. ACCOUNT OWNER AUTHORIZATION

I hereby authorize Horizon Trust Company to change my name on the account listed above as provided by the enclosed supporting documentation and/or this completed form.

Signature of New Legal Name:	New Legal Name: <i>(Print or Type)</i>	Date: <i>(MM/DD/YYYY)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>

PART 5. SIGNATURE VERIFICATION

! Do not sign this signature verification section unless present in front of a notary. This document must be signed at the time of obtaining a Notary or Medallion Signature Guarantee Stamp.

Signature of New Legal Name:	New Legal Name: <i>(Print or Type)</i>	Date: <i>(MM/DD/YYYY)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Notary or Medallion Signature Guarantee Stamp