

# Polar Investment Counsel, Inc.

Brokers and Investment Advisors; Member NASD, NFA, MSRB, SIPC

Website: www.polarinvest1.com

## ACCOUNT INFORMATION CHANGE FORM

(Complete applicable areas - this form must be notarized)

Account Name: \_\_\_\_\_

SWS# _____	NCFA# _____	NCF Product Name: _____
SWS# _____	NCFA# _____	NCF Product Name: _____
SWS# _____	NCFA# _____	NCF Product Name: _____
SWS# _____	NCFA# _____	NCF Product Name: _____

### ADDRESS CHANGE

Address moving from:

Address moving to:

STREET ADDRESS \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE + 4 DIGITS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE + 4 DIGITS \_\_\_\_\_

TELEPHONE: (\_\_\_\_\_) \_\_\_\_\_

TELEPHONE: (\_\_\_\_\_) \_\_\_\_\_

### MARITAL STATUS CHANGE

Reason for Change:  Marriage  Divorce  Separated  Widowed

**Proof of status change must be attached to this request as follows:**

Marriage: copy of marriage certificate (\*if name change is required, complete section below)

Divorce/Separated: copy of divorce/separation decree (\*if name change is required, complete section below)

Widowed: copy of death certificate for deceased spouse

**Additional documents needed:**

For: IRA account: complete Change of Beneficiary form

For: BASIC account: if spouse is to be added, complete a Joint Account Agreement

### NAME CHANGE

Reason for Change:  Marital Status Change  Legal Change

Name Changed From: \_\_\_\_\_

Name Changed To: \_\_\_\_\_

**Proof of name change must be attached to this request as follows:**

Marital Status Change: Copy of marriage certificate or divorce/separation decree

Legal Change: Copy of court order

CLIENT SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

CLIENT SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

### Notary: (Must not be a PICI affiliate)

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

**NOTARY STAMP or SEAL**

My commission expires \_\_\_\_\_.

County of \_\_\_\_\_ State of \_\_\_\_\_.

NOTARY SIGNATURE \_\_\_\_\_

PICI PRINCIPAL SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_