ForgeTrust

ACCOUNT OWNER INFORMATION CHANGE

Contact Center: (800) 248-8447 | www.ForgeTrust.com

Use this form to update your personal information on file with Forge Trust Co. These changes will apply to all accounts you own with Forge Trust Co.

1. PERSONAL INFORMATION (*required field)

Should we need to contact you in regards to this request, your preferred method of contact is:

- ☐ Email
- ☐ Primary Phone

First Name*	Middle Name	Last Name*
Social Security Number* Last 4 Digits Only	Date of Birth* (MM/DD/YYYY)	
Phone* XXX-XXX-XXXX	Email (Your personal email only)	

2. ADDRESS CHANGE

Legal/Permanent Address (Cannot be a PO Box, Mail Drop, Commercial Address, or C/O)

Address			
City	State/Province	Zip/Postal Code	Country

Mailing Address (if different from Legal/Permanent Address)

Important: Your mailing address will be used for tax reporting. If you maintain multiple residences, please provide the address associated with your legal residence.

Address			
City	State/Province	Zip/Postal Code	Country

3. PHONE NUMBER CHANGE

Primary Phone XXX-XXX-XXXX	◯ Cell ◯ Home ◯ Work	Secondary Phone XXX-XX-XXXX	◯ Cell ◯ Home ◯ Work

4. EMAIL CHANGE

Email

5. NAME CHANGE

Please attach documentation verifying your legal name change (e.g. Marriage Certificate or Court-Certified Name Change and a copy of the photo ID).

Former Name

First Name	Middle Name	Last Name	Suffix

New Name

First Name	Middle Name	Last Name	Suffix

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6. SIGNATURE AND DATE (Account owner must sign and date)

By signing below, you:

- Authorize Forge Trust Co. to act on all instructions given on this form.
- Accept all terms and conditions described in this form.
- Certify that all information you provided is correct to the best of your knowledge.

Print Account Owner Name*	
Signature X	Date (MM/DD/YYYY)

Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
newaccounts@ForgeTrust.com

Fax
(650) 745-2902

Regular mail
Forge Trust Co.
PO Box 2048
San Francisco, CA 94126

Overnight mail
Forge Trust Co.
4 Embarcadero Ctr, Floor 15
San Francisco, CA 94111

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