

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

Use this form to notify Forge Trust Co. of any slight discrepancies in the way your name is listed on your Forge Trust Co. account and the account from which your assets are being transferred (“Delivering Account”). For complete name changes, such as due to marriage or divorce, complete the Name Change form and include the appropriate legal documents such as a marriage certificate or divorce decree.

1. ACCOUNT OWNER (*required field)

Name on Forge Trust Co. Account

Should Forge Trust Co. need to contact you in regards to this request, your preferred method of contact is:

Email

Primary Phone

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

2. DELIVERING ACCOUNT

Please enter your name as it appears on the Delivering Account. Please refer to your statement as needed.

Examples of Alternate Name: nickname; alternate spelling; Jr./Sr.; or use of initials.

Name on Delivering Account

Name

3. SIGNATURE

Please check with your current financial institution to determine if a Medallion Signature Guarantee or Notary is required. Delays may occur if the requirements of the delivering financial institution are not met.

By signing below, you:

- Certify that the two names indicated above refer to one and the same person.
- Authorize Forge Trust Co. to accept transactions under either name.

Account Owner's Signature X	Date (MM/DD/YYYY)
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Please sign and submit additional documents as required.

DELIVERY INSTRUCTIONS

Email
transfers-in@ForgeTrust.com

Fax
(650) 745-2907

Regular mail
Forge Trust Co.
PO Box 6850
San Mateo, CA 94403

Overnight mail
Forge Trust Co.
3050 S Delaware Street, Ste. 202
San Mateo, CA 94403