



ADDRESS / NAME CHANGE FORM

Date: ____/____/____ Rep Name: _____

Client: _____ SS#: ____ - ____ - ____

Joint Client?: _____ SS#: ____ - ____ - ____

Name Change

Old Name: _____ New Name: _____

Reason: Marriage Divorce Other _____

Address Change

Seasonal? Y N

When Returning? ____ / ____ / ____

New Address: _____ Old Address: _____

Phone: (____) ____ - ____ Phone: (____) ____ - ____

Client Signature: _____ Date: _____

Death Notification

Client: _____

Who Contacted Us: _____ Relationship: _____ Contact #: (____) ____ - ____

STAFF USE ONLY

- | | | |
|------------|--|---|
| Source: | <input type="checkbox"/> Phone (Verification in writing) | <input type="checkbox"/> In Person (Signature on this form required) |
| | <input type="checkbox"/> Post Office (Returned mail w/ full name or signed p.o. notification card) | <input type="checkbox"/> E-Notes Report |
| Follow Up: | <input type="checkbox"/> Verified signature (initials ____) | <input type="checkbox"/> Updated Gold Mine |
| | <input type="checkbox"/> Updated Assets _____ | <input type="checkbox"/> Updated Insurances |
| | <input type="checkbox"/> Copied return envelope (if applicable) | <input type="checkbox"/> Marriage Certificate/Divorce Decree/Other _____ (if name change) |
| | | <input type="checkbox"/> Notified Credit Risk (if death) |
| | | <input type="checkbox"/> Sent CU Change Form (MF100) |