ROTH IRA CHANGE NOTICE (FORM 2409R)

Please Print or Type

____ ____ ____ ____ ____
CUID **(Credit union will complete.)**

____ ____ ____ - ____ ____ - ____ ____ ____ ____ - ____ ____
Social Security Number — IRA Suffix

(If owner's Social Security Number is being corrected, this should be the incorrect number.)

_____
Credit Union Name

_____
IRA Owner's Name (First, Initial, Last)

(If owner's name is being changed or corrected, this should be the former or incorrect name.)

_____
Account Number

(If the account number is being changed or corrected, this should be the former or incorrect number.)

GENERAL INFORMATION

This form can be used to make changes or corrections to Roth IRA owner information or to change the status of a Roth IRA. To make any other types of changes or corrections, use the appropriate form or report.

OWNER INFORMATION CHANGE/CORRECTION

To make changes to owner information, check the appropriate box(es) below and fill in the requested information.

☐ 1. _____
New/Correct Name (First, Initial, Last)

_____
New/Correct Account Number

☐ 2. _____
Correct Social Security Number

☐ 3. _____
Correct Birth Date (MM/DD/YYYY)

☐ 4. _____
New Address

_____

_____
City, State, ZIP

ACCOUNT STATUS CHANGE/CORRECTION

To make a change to the status of an account, check the appropriate box below and fill in any requested information.

☐ 1. Permanently close this zero balance account as of _____.
MM/DD/YYYY

☐ 2. Reopen this previously closed account.

CREDIT UNION'S SIGNATURE

Any changes indicated on this Change Notice (Form 2409R) were directed by the IRA owner.

X _____
Credit Union Representative's Signature

_____
Date (MM/DD/YYYY)

IRA OWNER'S SIGNATURE

Note: We recommend obtaining the IRA owner's signature before making changes to an IRA.

X _____
IRA Owner's Signature

_____
Date (MM/DD/YYYY)

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Stock #21220
2409R (Doc Code 09)
(Rev. 12/2009)