

ACCOUNT MAINTENANCE FORM

Use this form to change or update legal, mailing address, phone number, fax number, email address, PIN or security question on your account. Please only complete the sections applicable to the information you would like to change.



1. ACCOUNT INFORMATION

<i>Account Owner Name</i>	<i>iPlanGroup Account Number</i>
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2. NEW ADDRESS INFORMATION

<i>New Legal Address (Cannot be a P.O. Box)</i>	<i>City</i>	<i>State</i>	<i>Zip Code</i>
<i>New Mailing Address</i>	<i>City</i>	<i>State</i>	<i>Zip Code</i>

Check here if new Mailing Address is same as your Legal Address (default mailing address if no information is provided below)

3. NEW CONTACT INFORMATION

<i>New Primary Phone</i>	<i>New Secondary Phone</i>
<i>New Email Address</i>	<i>New Fax Number</i>

4. NEW SECURITY INFORMATION

New Security Question (Please select one option only)

What is your fathers middle name What was your first pet's name? What is your favorite sport's team?

<i>New Security Answer</i>	<i>New Pin Code</i>
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5. AUTHORIZATION AND SIGNATURE

IRA Plan Partners, LLC DBA iPlanGroup will only update your account to reflect the information you have provided on this form. By signing below, you acknowledge that you have read and understood this form in its entirety and instruct iPlanGroup to change any information on file for your account as instructed above.

<i>Account Owner Signature</i>	<i>Print Name</i>	<i>Date</i>
<i>Responsible Individual Signature (For a CESA or Minor Account only)</i>	<i>Print Name</i>	<i>Date</i>