

# Update Personal Information

Use this form to update a client name, address, phone number or email address. The update(s) will be applied to all accounts in the same household.



Using **DocuSign**® is faster than emailing this form to [support@freedomadvisors.com](mailto:support@freedomadvisors.com).

Sign via DocuSign

Primary Account Owner

Additional Account Owner

Account Number(s)

## Name Change

You must provide the relevant legal document associated with your name change.

First Name

Middle Name

Last Name

## Address Change

Legal Address (no PO Box)

Address 1

Address 2

City

State

Zip

Mailing Address

Address 1

Address 2

City

State

Zip

## Phone Number Change

Work

Mobile

Home

## Email Address Change

Requests to change an email address cannot be submitted from the new email address.

## Owner(s) Signature

Primary Account Owner/Trustee/Executor

Date (MM/DD/YYYY)

Co-Account Owner/Co-Trustee/Co-Executor

Date (MM/DD/YYYY)