

Achieve Montana

Account Information Change Form



- Use this form to change your—or the Joint Account Owner’s—name, mailing address, phone number, email address, Successor Account Owner, or interested party information associated with your Achieve Montana Account.
- If you are changing your name, your former signature and your new signature must be guaranteed in **Section 8** by an authorized officer of a bank, broker, or other qualified financial institution.
- If you are changing the Account Owner of an existing Account, your signature must be guaranteed in **Section 8** by an authorized officer of a bank, broker, or other qualified financial institution, and the new Account Owner must include an **Enrollment Form**.
- **Please note:** If you are changing the Account Owner of an existing account, Joint Account ownership is no longer available. If you choose to change the Account Owner, it will now be an Individual Account.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below. Do not staple.

Forms can be downloaded from our website at **www.achievemontana.com**, or you can call us to order any form—or request assistance in completing this form—at **1.877.486.9271** any business day from 7 a.m. to 6 p.m. Mountain time.

Return this form and any other required documents to: Achieve Montana P.O. Box 219448 Kansas City, MO 64121-9448	Phone Number: 1.877.486.9271 Hours: 7a.m. to 6 p.m. Mountain Time Monday through Friday Website: achievemontana.com
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1. Current Account Owner information

<input type="text"/>	—	<input type="text"/>
<input type="text"/>	—	<input type="text"/>
<input type="text"/>	—	<input type="text"/>

Account Number(s) *(To list more than three Accounts, use a separate sheet.)*

Name of Account Owner *(first, middle initial, last)*

Name of Joint Account Owner *(If applicable)*

 — —

Telephone Number *(In case we have a question about your Account.)*

2. Information to update or change

- Account Owner — **Section 3A and 4**
- Joint Account Owner — **Section 3B**
- Successor Account Owner — **Section 5**
- Interested Party — **Section 6**



3. Updated Account Owner information

- If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your Achieve Montana Account.
- If you are changing your name, you must also provide a signature guarantee in **Section 8**.

A. Individual or Entity Account Owner.

Name of Account Owner or Business Entity/Trust (first, middle initial, last)

Telephone Number (In case we have a question about your Account.)

Email Address

Permanent Street Address (A P.O. box is **not** acceptable.)

City

State

Zip Code

Account Mailing Address if different from above (This address will be used as the Account's address of record for all Account mailings.)

City

State

Zip Code

B. Joint Account Owner (If applicable)

Name of Joint Account Owner (first, middle initial, last)

Telephone Number (In case we have a question about your Account.)

Permanent Street Address (A P.O. box is **not** acceptable.)

City

State

Zip Code

4. Transfer assets to new Account Owner

- This will transfer ownership of all of the assets in the referenced Account to the new Account Owner listed below.
- The new Account Owner will control the Account and the disposition of all assets held in the Account.
- The new Account Owner must also complete an **Enrollment Form**.
- Joint Account Ownership is no longer available.

Account Number

Name of New Account Owner (first, middle initial, last)

Social Security Number or Taxpayer Identification Number (Required)

Birth Date (mm/dd/yyyy)

7. Signature — ALL ACCOUNT OWNERS MUST SIGN BELOW (However, if you are changing your name or transferring ownership of your Account(s) to a new Account Owner, skip this section and complete **Section 8** instead.)

I/We certify that the information provided herein is true and complete in all respects, and that I/we have read and understand, consent, and agree to all the terms and conditions of the Program Description and understand the rules and regulations governing Achieve Montana.

SIGNATURE

Signature of Account Owner

□□ — □□ — □□□□

Date (mm/dd/yyyy)

SIGNATURE

Signature of Joint Account Owner (If applicable)

□□ — □□ — □□□□

Date (mm/dd/yyyy)

8. Signature Guarantee — REQUIRED FOR NAME CHANGES AND CHANGES TO THE ACCOUNT OWNER OR JOINT ACCOUNT OWNER OF AN EXISTING ACCOUNT ONLY

- You must provide the following information as underwritten certification that the new signature is genuine.
- You can obtain a signature guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public cannot provide a signature guarantee, nor can you guarantee your own signature.
- **Do not sign below until you are in the presence of the authorized officer providing the signature guarantee.**

I/We certify that the information provided herein is true and complete in all respects, and that I/we have read and understand, consent, and agree to all the terms and conditions of the Program Description and understand the rules and regulations governing Achieve Montana.

For name change, sign here

SIGNATURE

Former Signature of Account Owner/Joint Account Owner (For name change only)

Current Signature of Account Owner

For transfer of Account ownership, sign here

Signature of Account Owner

Signature of Joint Account Owner (If applicable)

Signature of Guarantor

Title

Name of Institution

□□ — □□ — □□□□

Date (mm/dd/yyyy)

Authorized Officer to place stamp here

Empty box for authorized officer stamp.

