

# Notice of Name Change



Use this form to change your name on your American Century Investments® account(s).

Please print clearly in CAPITAL letters using black ink and sign in step 6.

## 1 Account Owner Information

Owner's Tax ID number or U.S. Social Security number

Owner's date of birth (month-day-year)

**Former name:**

Mr. / Mrs. / Ms. Owner's first name

Middle initial Owner's last name

**New legal name:**

Mr. / Mrs. / Ms. Owner's first name

Middle initial Owner's last name

If your name appears on the registration of other accounts not listed under the Tax ID number or Social Security number above, please list the account owner's name or account number(s) below.

Mr. / Mrs. / Ms. Account owner's first name

Middle initial Account owner's last name

Account number

Account number

## 2 Confirm Your Contact Information

Please provide your current address, telephone number and email address.

Address

Apartment/Unit

City

State

ZIP

Telephone (daytime)

Email address

## 3 Indicate the Reason for the Name Change

Reason for change:  Marriage  Divorce  Other

## 4

### Update Your Investor Services

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#### Bank Account Instructions – Attach a voided preprinted check

- Replace my existing bank account (Bank Name/Account No. \_\_\_\_\_) with the new bank.
- Add my new bank account. Keep the other bank accounts I have on file, if any.

#### CheckWriting Check Reorder (Only applies if CheckWriting is available on your account.)

- Please send me CheckWriting checks showing my new name.

## 5

### Review Your Beneficiary Designation

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Now may be a good time to review any beneficiary designations for your account(s). In the event of a divorce, a designation of a former spouse may not be valid unless you re-designate your former spouse by submitting a new beneficiary form after the divorce is final. To manage beneficiaries, log in or register at [americancentury.com](http://americancentury.com). Or, if your account type does not permit online beneficiary management, download the appropriate beneficiary form and mail it to us.

## 6

### Sign Your Name and Date

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This form must be submitted along with supporting legal documentation showing your new name (marriage certificate, divorce decree, etc.). If you do not have legal documentation, you must have your signature guaranteed.

#### By signing this form, I certify that:

- I am of legal age.

#### Certify Your Tax ID

If you'd like more information about certifying your taxpayer identification number, please review the General Instructions on IRS Form W-9, which can be found at [www.irs.gov](http://www.irs.gov).

FATCA Reporting - If you are submitting this form for an account you hold in the United States, you may leave the second field below blank.

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting.

Exemptions Codes (Codes apply only to certain entities, not individuals that are exempt from reporting under FATCA)

Exemptions (see instructions in IRS Form W-9):

Exempt payee code (if any) \_\_\_\_\_ Exemption from FATCA reporting code (if any) \_\_\_\_\_ (Applies to accounts maintained outside the U.S.)

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number, and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person.
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification Instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

The IRS does not require consent to any provision of this document other than the certifications required to avoid backup withholding.

Signature

Date Signed

Affix signature guarantee stamp. (Only required if not providing legal documentation.) The stamp must indicate "Signature Guaranteed/Medallion Guaranteed" and include the officer's signature, title and the date. Notarization is not acceptable in lieu of a guarantee.

#### Personal accounts

P.O. Box 419200  
Kansas City, MO 64141-6200  
1-800-345-2021

#### Business, Not-For-Profit and Employer-Sponsored Retirement Plans

P.O. Box 419385  
Kansas City, MO 64141-6385  
1-800-345-3533