

Contact Change Form

Use this form only if you are updating an existing Account.
Questions? Please call us at (864)331-4400

1. Client information

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Account Owner's Name (First)

(MI)

(Last Name)

Social Security Number

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Joint Account Owner's Name (First)

(MI)

(Last Name)

Social Security Number

2. Account information

This change applies to all of my accounts. OR

This change applies only to the account(s) listed below.

Account Name

Account Number

Account Name

Account Number

Account Name

Account Number

Account Name

Account Number

Account Name

Account Number

Account Name

Account Number

3. Address change (All information is required)

New residential address or principal place of business (no P.O. boxes except A.P.O. or F.P.O. boxes)

Street Address/A.P.O. or F.P.O. Box/Apt. #

City

State

Zip Code

Phone Number

Email Address

Mailing address (if different from above)

Street Address/A.P.O. or F.P.O. Box/Apt. #

City

State

Zip Code

Phone Number

Alternate Email Address

Electronic Delivery

I consent to receiving electronic delivery of documents and information as described below:

By checking the box above, I consent to receive documents digitally, instead of paper format by mail, including account statements, tax information statements, annual privacy policy and other account documents. My consent will remain in effect unless and until revoked. I understand that J. Freeman & Associates will send me an email when documents are available for viewing, downloading, and printing. Each email will provide either an attachment or a link allowing access to documents online. Accessing documents online requires minimum technical requirements, including: (1) access to the internet, (2) a valid email address, and (3) installation of Adobe Acrobat Reader on the computer. (Adobe Acrobat Reader can be downloaded, free of charge, at www.adobe.com.) I understand that no confidential data will be sent through email, and J. Freeman & Associates does not charge a fee for providing electronic documents. I understand that I can receive a free paper copy of any document and/or revoke my consent to electronic delivery at any time by calling (864)331-4400.

4. Signature

X

Signature of Owner (Sign exactly as name appears in Section 1)

Date (MM/DD/YYYY)

X

Signature of Co-Owner (Sign exactly as name appears in Section 1)

Date (MM/DD/YYYY)

5. Return

Email:

marketing@J-Freeman.com

Fax:

(864)331-4401

Regular Mail:

J. Freeman & Associates
 Post Office Box 3597
 Greenville, SC 29608

Express:

J. Freeman & Associates
 8 Pelham Road
 Greenville, SC 29615

Post Office Box 3597 ■ Greenville, SC 29608 ■ 864-331-4400 ■

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