

ROTH IRA CHANGE NOTICE (FORM 2409R)

Please Print or Type

_____ CUID (Credit union will complete.)

_____ Credit Union Name

_____ Social Security Number _____ IRA Suffix

_____ IRA Owner's Name (First, Initial, Last)

(If owner's Social Security Number is being corrected, this should be the incorrect number.)

(If owner's name is being changed or corrected, this should be the former or incorrect name.)

_____ Account Number

(If the account number is being changed or corrected, this should be the former or incorrect number.)

GENERAL INFORMATION

This form can be used to make changes or corrections to Roth IRA owner information or to change the status of a Roth IRA. To make any other types of changes or corrections, use the appropriate form or report.

OWNER INFORMATION CHANGE/CORRECTION

To make changes to owner information, check the appropriate box(es) below and fill in the requested information.

- 1. _____ New/Correct Name (First, Initial, Last) _____ New/Correct Account Number
- 2. _____ Correct Social Security Number
- 3. _____ Correct Birth Date (MM/DD/YYYY)
- 4. _____ New Address _____

City, State, ZIP

ACCOUNT STATUS CHANGE/CORRECTION

To make a change to the status of an account, check the appropriate box below and fill in any requested information.

- 1. Permanently close this zero balance account as of _____ MM/DD/YYYY.
- 2. Reopen this previously closed account.

CREDIT UNION'S SIGNATURE

Any changes indicated on this Change Notice (Form 2409R) were directed by the IRA owner.

X _____ Date (MM/DD/YYYY)
Credit Union Representative's Signature

IRA OWNER'S SIGNATURE

Note: We recommend obtaining the IRA owner's signature before making changes to an IRA.

X _____ Date (MM/DD/YYYY)
IRA Owner's Signature