

Complete one per person needing name change or name correction.

1 Representative and Account Information

Representative Name	Representative Phone (10 digits)	Rep ID
Primary Account Owner	Primary Account Owner SSN/TIN	Account #

2 Account Name To Change Or Correct (Enter name as it currently appears on the account.)

Name Which Needs To Be Changed Or Corrected	SSN/TIN
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3 Legal Name (You must sign your full legal name on the signature line.)

A. My full legal name is: _____

B. Indicate the reason for providing this: I did not provide my full legal name on the U.S. Bancorp Investments, Inc. account application.
 I have legally changed my name. *You must submit a copy of the legal document substantiating this change. Indicate the document you are submitting to substantiate this change:*
 Court decree Certificate of marriage Other: _____
Specify

I understand that I am bound by the Terms and Conditions printed in the U.S. Bancorp Investments Account Application Customer Agreement including the Pre-dispute Arbitration Agreement.

Signature Date

4 Other Accounts Affected by This Request

List any other U.S. Bancorp Investments accounts to which this name change or correction applies.

Account #	Account #
Account #	Account #
Account #	Account #

Instruction for U.S. Bancorp Investment Representative Only
Submit via workflow, provide a copy to client. Original to branch file.

Investment and insurance products and services including annuities are: NOT A DEPOSIT • NOT FDIC INSURED • MAY LOSE VALUE • NOT BANK GUARANTEED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY

Investment and insurance products and services including annuities are available through U.S. Bancorp Investments, the marketing name for U.S. Bancorp Investments, Inc., member FINRA and SIPC, an investment adviser and a brokerage subsidiary of U.S. Bancorp and affiliate of U.S. Bank.

Insurance products are available through various affiliated non-bank insurance agencies, which are U.S. Bancorp subsidiaries. Products may not be available in all states. CA Insurance License# 0E24641.