

**ROTH IRA CHANGE NOTICE  
(FORM 2409R)**

**Please Print or Type**

\_\_\_\_\_  
CID# (Organization will complete.)

\_\_\_\_\_  
Financial Organization Name

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

\_\_\_\_\_  
IRA Suffix

\_\_\_\_\_  
IRA Owner's Name (First, Initial, Last)  
*(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.

**FINANCIAL ORGANIZATION'S SIGNATURE**

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

**X** \_\_\_\_\_  
Organization Representative's Signature Date (MM/DD/YYYY)

**IRA OWNER'S SIGNATURE**

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

**X** \_\_\_\_\_  
IRA Owner's Signature Date (MM/DD/YYYY)