TRADITIONAL IRA CHANGE NOTICE (FORM 2309)

Please Print or Type

28002
CID# **(Organization will complete.)**

UFCW Community Credit Union
Financial Organization Name

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

IRA Owner's Name
(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 IRA owner information or to change the status of an 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 2309) 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)

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