

# MFS<sup>®</sup> NAME CHANGE AUTHORIZATION FORM



If you have any outstanding certificates, please return them with this form. We recommend that certificates be returned to MFS Service Center, Inc. (MFSC) unendorsed and by registered mail.

## 1. Account Information (Please enter the account information as it is currently registered.)

ACCOUNT REGISTRATION \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_

-   -

SOCIAL SECURITY NUMBER

PHONE NUMBER \_\_\_\_\_

This is my new address; please update my account information.

**Note:** If the new address is a non-U.S. address, you will be restricted from making additional purchases into this account and exchanges into and out of this account.

## 2. Account Owner's New Name

Please provide both your former and new names, and sign below as both your former and new name. A Medallion Signature Guarantee is required.

I authorize MFS to change my name on my account(s) from my former name \_\_\_\_\_  
FORMER NAME

to my new name \_\_\_\_\_  
NEW NAME

SIGNATURE (FORMER NAME) \_\_\_\_\_ DATE (MM/DD/YYYY) \_\_\_\_\_

SIGNATURE (NEW NAME) \_\_\_\_\_ DATE (MM/DD/YYYY) \_\_\_\_\_

### Medallion Signature Guarantee

AFFIX GUARANTEE STAMP

Medallion Signature Guarantee stamp must not be dated. The signature(s) must be guaranteed by an eligible bank, broker, dealer, credit union, national securities exchange, registered securities association, clearing agency, or savings association. Medallion Signature Guarantees will be accepted in accordance with policies established by MFS Service Center, Inc. Notarization by a notary public is not acceptable in lieu of a Medallion Signature Guarantee provided by one of the eligible guarantor institutions listed above.

### 3. Minor's New Name

Complete this section to change the name of a minor listed in the account registration.

- For custodial accounts, the custodian should complete this section.
- For Minor IRA accounts, the guardian should complete this section.
- For Coverdell accounts, the responsible person should complete this section.

Please provide both the minor's former and new name. A Medallion Signature Guarantee is required.

I authorize MFS to change the minor's name for the account(s) registration provided in Section 1 from his/her former name

FORMER NAME \_\_\_\_\_

to his/her new name \_\_\_\_\_

NEW NAME

SIGNATURE OF CUSTODIAN, GUARDIAN, OR RESPONSIBLE PERSON \_\_\_\_\_

DATE (MM/DD/YYYY) \_\_\_\_\_

PRINT NAME \_\_\_\_\_

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### 4. Current Service Options (Optional)

Complete this section only if your bank information on file has changed. To add new bank information to your account, please complete the applicable service form.

**Note:** To update any other service options, including Check Writing, please complete the applicable service form.

Please update the name on all current bank information on file to the registration below.

**Or**

Please update the name on only the bank account listed below.

Account type:  Checking  Savings

NAME ON CHECKING/SAVINGS ACCOUNT (REQUIRED) \_\_\_\_\_

BANK NAME (REQUIRED) \_\_\_\_\_

BANK ACCOUNT NUMBER (REQUIRED) \_\_\_\_\_

BANK ROUTING NUMBER (REQUIRED) \_\_\_\_\_

If you have any questions about this form, please contact the Client Services Department at 1-800-225-2606 any business day.

**Mail completed form to:**

**Regular mail**

MFS Service Center, Inc.  
P.O. Box 219341  
Kansas City, MO 64121-9341

**Overnight mail**

MFS Service Center, Inc.  
801 Pennsylvania Ave, Suite 219341  
Kansas City, MO 64105-1307