



# Account Information Update Form

NuView IRA - Processing Office  
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## 1 GENERAL INFORMATION

<b>Account Holder's Name</b> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____		
<b>Date of Birth (MM/DD/YYYY)</b>	<b>Social Security Number</b>	<b>NuView Account Number</b>

## 2 UPDATE PERSONAL INFORMATION *(skip if no changes)*

<b>Legal Name (Required)</b> <input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. _____			
<b>Address</b>			<b>City, State, Zip</b>
<b>Primary Phone</b>	<b>Fax</b>	<b>Mobile</b>	<b>Email Address</b>
<b>Marital Status</b> <input type="checkbox"/> Single <input type="checkbox"/> Married <i>(see Consent of Spouse)</i> <input type="checkbox"/> Widowed or Divorced			

## 3 UPDATE INTERESTED PARTY DESIGNATION *(skip if no changes)*

I hereby authorize the following representative as interested party on my self-directed IRA. I understand this named representative will have access to my account details, balance, holdings and any other account related activity. Interested parties DO NOT have the ability to sign on your behalf or move funds in or out of your self-directed account. I also understand that this will remain in effect until revoked in writing.

<b>Name (Individuals only)</b>	<b>Phone</b>	<b>Email</b>
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## 4 ACKNOWLEDGEMENT

I approve the specified changes above to be made to my self-directed IRA account.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_