

IRA ACCOUNT MAINTENANCE FORM

Complete this form to change your name, permanent and/or mailing address, phone number, email address, contribution rate, annual increase, or bank information. You may also update this information online by logging into your account at saver.calsavers.com.

If you are changing your legal name, your signature with your old name and your signature with your new name are required to be Medallion Signature Guaranteed in Section 3 by an authorized officer of a bank, broker, or other qualified financial institution. In place of a Medallion Signature Guarantee, you have the option to submit a signed letter of instruction with supporting legal documentation (i.e. marriage certificate, court order, divorce documentation) for this change.

The updates/changes on this form override all previous elections for this IRA.

Completed forms should be mailed to:	CalSavers PO Box 55759 Boston, MA 02205-5759	Overnight Address:	CalSavers 95 Wells Avenue, Suite 155 Newton, MA 02459
855-650-6918 8:00 am to 8:00 pm Pacific St	andard Time M-F		saver.calsavers.com

IRA OWNER INFORMATION (All fields required)

If you are updating your information, enter the information that is currently on file in this section and the new information in Section 3.

Account Number
IRA Owner Legal Name (First) (If you are changing your name, enter the name you have on file in this section.) (M.I.)
IRA Owner Legal Name (Last)
Telephone Number (In case we have a question about your Account. If you are updating your phone number, enter the number you have on file in this section and the new number in Section 3.)

Employer Name (If you contribute through more than one employer and want to change your contribution rate or automatic annual increase election, you must submit a separate form for each employer.)

2. ACCOUNT UPDATES OR CHANGES

Check the box(es) to indicate which section(s) you plan to update or change.

IRA Owner Information – Section 3

Bank Information – Section 4

Contribution Rate – Section 5

Automatic Annual Increase – Section 6

3. UPDATE IRA OWNER INFORMATION

If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your CalSavers IRA.

If you are changing your name, you must also provide a Medallion Signature Guarantee below or legal document(s) verifying the name change.

]]													
IRA (Owne	r Leg	al Na	me (F	irst)																				(M.I.)
]														
IRA (Owne	r Leg	al Na	me (L	.ast)]]]	1	1]]] [] [_			
]]]													
Ema	il Add	ress																							
]]													
Phys	ical A	ddres	s (W	e can	not ac	cept	a PO	Box)																	
]												 _		
City													- L		Sta	ate		Zip C	Code						
											1														
Mail	ing Ac	ddres	s if d	iffere	nt froi	m abo	ove (7	This a	ddres	s will	be us	sed as	the a	addre	ss of	recor	d an	d for	all m	ailing	ys)				
] [_		
City															Sta	ate		Zip C	ode						
			_[-																		
Tele	phone	Num	nber				L																		

Medallion Signature Guarantee — REQUIRED FOR NAME CHANGES TO THE ACCOUNT OWNER OF AN EXISTING ACCOUNT ONLY

- You must provide the following information as underwritten certification that the new signature is genuine.
- You can obtain a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public cannot provide a Medallion Signature Guarantee, nor can you guarantee your own signature.
- Do not sign below until you are in the presence of the authorized officer providing the signature guarantee.

By signing here I certify that the information provided herein is true and complete in all respects.

	Authorized Officer to Place Stamp Here
L Former Signature of Account Owner <i>(For name change only)</i>	
Current Signature of Account Owner	
Signature of Guarantor	
Title	
Name of Institution	
Date (mm/dd/yyyy)	

UPDATE BANK INFORMATION

Important: By signing this form, you agree and confirm that your ACH transaction will not involve the branches or offices of a bank or other financial services company located outside the territorial jurisdiction of the United States.

Add	Delete Bank Information Indicated Below	Delete All Current Bank Information and Add New Bank Information Below
Financial Organiz	ation Name	
Financial Organiz	ation Routing Number	Financial Organization Account Number
ACCOUNT TYP	PE (Select one)	
Checking	Savings	
<i>Note:</i> The routin routing number.	ng number is usually located on the bottom le	eft corner of your checks. You can also ask your financial organization for the
Add	Delete Bank Information Indicated Below	Delete All Current Bank Information and Add New Bank Information Below
Name		
Financial Organiz	ration Routing Number	Financial Organization Account Number
ACCOUNT TYP	PE (Select one)	
Checking	Savings	

Note: The routing number is usually located on the bottom left corner of your checks. You can also ask your financial organization for the routing number.

5. UPDATE CONTRIBUTION RATE

If you wish to change your contribution rate, enter the percentage of your pay check you wish to contribute as a whole number. Note: Your contributions to all of your Roth IRA are limited to \$5,500 (\$6,500 if 50 or older) for 2018 depending on your income. See IRS Publication 590A for more information.

AUTOMATIC ANNUAL INCREASE 6.

Contributions for accounts open at least 180 days will automatically increase by 1% on January 1 of each year, with the first increase scheduled for January 1, 2020.

I wish to have my contribution rate automatically increased by 1% each year until it reaches 8%.

I DO NOT wish to have my contribution rate automatically increased each year.



I certify that I am the account owner and verify the information above is accurate. I assume responsibility for any consequences that may result from these changes and I agree that CalSavers, the custodian, or the program administrator are not responsible for any consequences that may arise from executing the changes outlined in this form.



Signature of IRA Owner