Name / Address Change Form

SCHOOLSFIRST
Plan Administration, LLC

FAX COMPLETED FORMS TO: 714.258.4051

Submission of this form effectively updates the address and/or name on record for your SchoolsFirst FCU/Nationwide Retirement Builder Plan only.

Note: Please allow **5 business days** for updates to your account to reflect on www.nationwide.com.

1 Participant Information

First Name | Last Name | Social Security Number (REQUIRED) | Phone #

School District | Email Address

2 Address Update

Previous Mailing Address | City | State | Zip Code

New Mailing Address | City | State | Zip Code

Physical Address (Required if changing mailing address to P.O. Box) | City | State | Zip Code

Email Address | Phone Number

3 Name Change **Include documentation of name change. (i.e. Driver's License, Marriage Certificate, divorce decree or court order)**

Current Name

New Name

Documentation provided as evidence of name change

4 Signatures

I certify that I am the proper party to authorize and make updates to the above information. I have provided the proper documentation and I authorize SchoolsFirst FCU to make the necessary updates to my Nationwide Retirement Builder Plan. **Note:** This form will not update your SchoolsFirst FCU Membership(s).

Participant Signature (REQUIRED) | Date

BOX BELOW TO BE COMPLETED BY THE CUSTODIAN.

Custodian Approval | Date

(08/2017)