



VANTAGE®

# Client Contact Update Form

Date Stamp  
(Office use only)  
Rev. 12/31/18

This is a fillable PDF form. To complete the form, click in an area and type.

To better serve you and ensure timely delivery of correspondence,  
please provide us with your current contact information.

### Did you know?

Your contact information can now be updated using our online Payment Portal  
Visit [www.VantageIRAs.Force.com](http://www.VantageIRAs.Force.com)

### Account Owner's Information

Name: \_\_\_\_\_ Account Number: \_\_\_\_\_

### Please Update My Contact Information with the Following:

Check here if your information has not changed

Legal Address: \_\_\_\_\_  
*(P.O. Box not allowable. Must be legal residence.)*

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
*(If different than above)*

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mobile: \_\_\_\_\_

Primary Email Address: \_\_\_\_\_ Secondary Email Address: \_\_\_\_\_

Would you like to receive account alerts via SMS text message?  Yes  No

*\*Standard text message and data rates may apply.*

*\*\*You can opt-out at any time by texting **STOP** to (480) 297-0440 or contact our office at (480) 306-8404.*

### Authorization

Account Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Please return this form via one of the following methods:

**MAIL**  
Vantage Retirement Plans, LLC  
20860 N. Tatum Blvd. #240  
Phoenix, AZ 85050

**EMAIL**  
[Administration@VantageIRAs.com](mailto:Administration@VantageIRAs.com)

**FAX**  
(480) 306-8408