Client Contact Update Form

Date Stamp
(Office use only)
Rev. 2/13/2024

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

Did you know?
Your contact information can be updated online. Go to VantageIRAs.com and click Client Login to access your account. Click the Contact Info tile to get started.

Account Owner Information *(As it appears on your account application)*

Name: ______________________________ **Account Number:** ______________________

Please Update Contact Information with the Following:

○ **Check here if the information has not changed**

Mailing Address: ______________________________

City: ______________________________ **State:** __________ **Zip:** ______________

Mobile: ______________________________

Primary Email Address: ______________________________

Legal Address: ______________________________
(If different than above; P.O. Box not allowable. Must be legal residence.)

City: ______________________________ **State:** __________ **Zip:** ______________

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) 306-8408.*

Authorization

Account Owner's Signature: ______________________________ **Date:** ______________

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