Client Contact Update Form

Date Stamp
(Office use only)
Rev. 11/12/2021

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 http://VantageIRAs.Force.com

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

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) 306-8408.*

Authorization

Account Owner's Signature: ______________________ **Date:** __________

Please return this form via one of the following methods:

MAIL
Vantage Retirement Plans, LLC
8742 E. Via de Commercio
Scottsdale, AZ 85258

EMAIL
Administration@VantageIRAs.com

FAX
(480) 306-8408