

### Important information about IRA account maintenance

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 [www.MyCTSavings.com](http://www.MyCTSavings.com).

If you are changing your legal name, in Section 3, your signature using your old name and your new name are required to be Medallion Signature Guaranteed 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.

### Contact us:

9 am to 6 pm Eastern Time, M-F

### Employer assistance:

1-833-811-7435

### Employee assistance:

1-833-811-7436

### Completed forms should be mailed to:

MyCTSavings  
PO Box 9896  
Providence, RI 02940-8096

### Overnight address:

MyCTSavings  
4400 Computer Drive  
Westborough, MA 01581

[www.MyCTSavings.com](http://www.MyCTSavings.com)

## 1 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)

\_\_\_\_\_  
(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

**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 MyCT Savings 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 owner legal name (First) (M.I.)

\_\_\_\_\_  
IRA owner legal name (Last)

\_\_\_\_\_  
Email address

\_\_\_\_\_  
Physical address (We cannot accept a PO box)

\_\_\_\_\_  
City State ZIP code

\_\_\_\_\_  
Mailing address if different from above (This address will be used as the address of record and for all mailings)

\_\_\_\_\_  
City State ZIP code

\_\_\_\_\_  
Telephone number

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**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.

\_\_\_\_\_  
**Former signature of account owner** (For name change only)

\_\_\_\_\_  
**Current signature of account owner**

\_\_\_\_\_  
**Signature of guarantor**

**Authorized officer to place stamp here**

\_\_\_\_\_  
**Title**

\_\_\_\_\_  
**Name of institution**

\_\_\_\_ - \_\_\_\_ - \_\_\_\_  
**Date** (mm/dd/yyyy)

**4 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.

**Current marital status**

- Add     Delete bank information indicated below     Delete all current bank information and add new bank information below

\_\_\_\_\_  
**Financial organization name**

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\_\_\_\_\_  
Financial organization routing number

\_\_\_\_\_  
Financial organization account number

**Account type** (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.

Add  Delete bank information indicated below  Delete all current bank information and add new bank information below

\_\_\_\_\_  
**Name**

\_\_\_\_\_  
Financial organization routing number

\_\_\_\_\_  
Financial organization account number

**Account type** (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 \$6,000 (\$7,000 if 50 or older) for 2021 depending on your income. See IRS Publication 590A for more information.*

\_\_\_ \_\_\_ %

**New contribution rate**

## 6 Signature

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 MyCT Savings, 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**

\_\_\_\_\_  
**Date** (mm/dd/yyyy)