

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.MERITSaves.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 notarized. In place of a notarization acknowledgement, 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:

9am to 6pm Eastern Time, M-F

Employer assistance:

1-833-608-8811

Employee assistance:

1-833-608-8840

Completed forms should be mailed to:

MERT
PO Box 534495
Pittsburgh, PA 15253-4495

Overnight address:

MERIT
500 Ross Street, 154-0520
Pittsburgh, PA 15262

MERITSaves.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 MERIT IRA.

If you are changing your name, you must also provide a notarization acknowledgement 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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Notarization acknowledgement (Required for name changes to the owner of an existing account only)

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the IRA account.

Only sign if you are in the presence of a notary public or other officer providing notarization.

Former signature of account owner
(For name change only)

Current signature of account owner

STATE OF

COUNTY OF

The foregoing instrument was acknowledged before me by means of

physical presence or online notarization,

This _____ day of _____, 20____, by _____

Signature of Notary Public - State of _____

Circle one:
Personally Known OR **Produced Identification**

Type of Identification Produced

**Print, Type, or Stamp Commissioned
Name of Notary Public**

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

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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 \$6,500 (\$7,500 if 50 or older) for 2023 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 Maine Retirement Investment Trust (MERIT), 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)