



Account information update

Use this form to change the name of your philanthropic account, account advisors, or address.

If you require extra space, include additional sheets. Please do not staple.

For more information, refer to our *Policies & Guidelines* booklet.

Contact us
with questions
donorservice@vanguardcharitable.org

1 Account information

Account number	Account name	
A	The	Fund

2 Identify changes

<p>Add, remove, update, or replace account advisor Complete sections 1, 2, 3, and 5</p>
<p>Enact Succession Plan: update account advisors Please submit completed account information update form along with a copy of a death certificate or power of attorney. Complete sections 1, 2, 3, and 5</p>
<p>Change account name - <i>This can be completed online</i> Complete sections 1, 2, 4, and 5</p>
<p>Update account advisor address - <i>This can be completed online</i> Complete sections 1, 2, 3, and 5</p>

Additional information

3 Account advisors

A maximum of two advisors may be named to the account. All advisors have ongoing account privileges and access and must together consent to changes to the account name and advisors. Account advisors may independently recommend changes to the account succession plan, interested parties, grants and exchanges. If naming an individual as an account advisor who is currently named on the account’s succession plan on file, the succession plan will need to be updated. Account advisors cannot also be successor advisors on the same account.

3a. Account advisor

Replace account advisor

If the current account advisor is unable to act due to incapacity or disability, include a copy of a durable power of attorney. If the current account advisor has died, include a copy of the death certificate.

Update current account advisor information

Remove account advisor

Change or update current account advisor FROM:

If the current account advisor is unable to act due to incapacity or disability, include a copy of a durable power of attorney. If the current account advisor has died, include a copy of the death certificate.

Name <i>salutation, first, middle initial, last</i>	Last 4 digits of SSN or PIN
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Change or update account advisor TO:

Name <i>salutation, first, middle initial, last</i>			
Last 4 digits of SSN or PIN	Birth date <i>mm-dd-yyyy</i>		
Preferred phone		Alternate phone	
Primary	Mobile	Other	Primary Mobile Other
Mailing address or PO Box number			
Business	Home	Mailing	Other
City		State	Zip
Email address		Preferred contact method	
		Email	Phone Mail
Relationship to current account advisor			

By signing this form, you acknowledge that you read and agree to abide by the terms and conditions in our Policies & Guidelines booklet.

Signature of new account advisor X	Date <i>mm-dd-yyyy</i>
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3a. Account advisor

Add another account advisor

Replace account advisor

If the current account advisor is unable to act due to incapacity or disability, include a copy of a durable power of attorney. If the current account advisor has died, include a copy of the death certificate.

Update current account advisor information

Remove account advisor

Change or update current account advisor FROM:

Name <i>salutation, first, middle initial, last</i>	Last 4 digits of	SSN or	PIN
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Change or update account advisor TO:

Name <i>salutation, first, middle initial, last</i>			
Last 4 digits of	SSN or	PIN	Birth date <i>mm-dd-yyyy</i>
Preferred phone		Alternate phone	
Primary	Mobile	Other	Primary Mobile Other
Mailing address or PO Box number			
Business	Home	Mailing	Other
City		State	Zip
Email address		Preferred contact method	
		Email	Phone Mail
Relationship to current account advisor			

By signing this form, you acknowledge that you read and agree to abide by the terms and conditions in our Policies & Guidelines booklet.

Signature of new account advisor	Date <i>mm-dd-yyyy</i>
X	

4 New account name

If applicable

Change account name FROM:

Account name	Fund
The	

Change account name TO:

Do not use the words "trust," "endowment," "fund," or "foundation."

Account name	Fund
The	

5 Required signatures

By signing below, I authorize Vanguard Charitable to change account advisors, account name, or address as detailed in Section 2 and Section 3 above. I acknowledge I have read and agree to abide by the terms and conditions in the *Policies & Guidelines* booklet.

All Account Advisors must sign to add, replace, or remove Account Advisors

Current account advisor

Name <i>first, middle initial, last</i>	
Signature X	Date <i>mm-dd-yyyy</i>

Current account advisor

Name <i>if applicable first, middle initial, last</i>	
Signature X	Date <i>mm-dd-yyyy</i>

<p>Return information</p> <p>Return this form and required documentation to Vanguard Charitable.</p>	<p>Email: donorservice@vanguardcharitable.org <i>We recommend encrypting the form and sharing the password separately.</i></p> <p>Fax: 866-485-9414</p> <p>Mail: Vanguard Charitable PO Box 980 Burtonsville, MD 20866-9998</p>
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