

Change name



Use this form to change your legal name on all of your accounts.¹ Enter your information clearly using blue or black ink.

1. Your information

A legal name change affects all of your accounts.¹

Name currently on account(s)	Security code (If left blank, your request could be delayed)		
Address	City	State	ZIP
Home phone	Email		

2. Change the name on your account(s)

Required, copy of your signed Social Security card with your new name must be sent with this request.

New name

3. Order new checks and/or Visa® Debit card

Would you like to order either of the following with the new name on your eligible account(s):

Order checks. New checks will be the same style as your previous order; fees apply.

Order Visa® Debit card. Debit card and PIN will be sent separately in 7 to 10 days.

4. Agreements and certifications

By signing section 5 and by maintaining an EverBank Account(s), I understand and agree that EverBank, National Association ("EverBank") will rely on the veracity and completeness of the information on this form in opening or making the requested account(s) changes. I hereby certify that the information provided on this form and any accompanying documentation is true, complete, and accurate and that I will notify EverBank of any material change in such information or statements. I agree/ understand and certify to EverBank that:

- I have read and agree to be bound by the terms and conditions of the account as set forth in the Personal Account Terms, Disclosures and Agreements Booklet, the Deposit Account Fee Schedule, and any other disclosures or addenda related to the accounts or services I have requested on this form, and to which I give my consent to EverBank opening and/or providing, each of which may be amended from time to time.
- I authorize you to make any credit, employment, or other investigative inquiries you deem appropriate (including, without limitation, obtaining a consumer report) in connection with your determination to open, renew, update, maintain, or collect on my account. I understand that upon my request, EverBank will provide information on whether a consumer report was obtained and the names and addresses of any consumer-reporting agencies that provided such report(s).
- I understand that you may report information about my account to credit bureaus. Late payments, missed payments, or other default on my account may be reflected in my credit report. In addition, I understand that I am being notified, as required by law, that a negative credit report reflecting on my credit record may be submitted to a credit reporting agency if I fail to fulfill the terms of any credit obligations I may have to EverBank.
- I understand that all information I supply when applying for an account or requesting new or additional products or services becomes property of EverBank and will not be returned, except as required by law.

The undersigned agrees that we, EverBank, in our sole discretion, may accept documents that you have signed and sent to us by electronic means, like fax, email, or other file transmittal processes we might offer. By sending us any such document by electronic means, the undersigned agrees that we may rely on it and on the signature, and that the document is binding on the signer even if the original signed document is not delivered to us.

1. Your request to change your legal name will be applied to: (a) all of your consumer accounts (individual and joint), (b) all accounts for which you serve as a trustee, an agent under a power of attorney, or other legal capacity, (c) all accounts on which you are listed as a beneficiary, (d) all accounts for which you serve as an authorized signer, and (e) any other accounts with which you are associated in some other capacity.

Backup withholding certifications. For federal tax purposes, a U.S. person includes an individual who is a U.S. citizen or U.S. resident alien; a U.S. partnership, corporation, or company; and domestic trusts and estates. The following certifications relate to this tax status and reporting obligations applicable to EverBank. For joint accounts, these certifications are made as to the primary account holder. Non-U.S. persons do not make these certifications and should check the box below where indicated and provide the corresponding additional documentation.

Under penalties of perjury, I certify that:

1. The taxpayer identification number I have given on this form is correct; and
2. I am a U.S. citizen or other U.S. person; and
3. I am not subject to backup withholding because:
 - (a) I am exempt from backup withholding, or
 - (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or
 - (c) the IRS has notified me that I am no longer subject to backup withholding; and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Check this box if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return

Check this box if you are not a U.S. person. Non-U.S. persons (that is, persons who are not a U.S. citizen, U.S. resident alien, or other U.S. person) will need to provide EverBank with the applicable IRS Form W-8 (to certify foreign status; electronic copies will not be accepted), a copy of your valid passport and proof of residence.

5. Signature(s)

If you've changed the name on your account, sign and print your former name immediately below.



Former name signature

Former name **(Please print)**

Your new signature is required below.

By signing below the undersigned acknowledges and agrees to these terms and conditions.

Note: The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup withholding.

All account holders and authorized signers must sign this form.²



Signature of name change requestor

Date

Additional account holder

Date

Additional account holder

Date

Additional account holder

Date

6. Submit

Upload this form and any additional documentation so that we can move forward in the quickest and most secure way. Simply log in to your account at everbank.com and:

- Select the **Actions** tab
- In the TIAA Documents section, select **Upload documents**
- Select **Files** you would like to upload
- Select **Folder** to upload files to and follow directions

2. Please note that joint account holders are required to execute this form, and if you are a joint account holder on multiple accounts that have different other joint account holders, you must submit separate signature pages of this form for each such joint account.

In addition, other authorized signers on business accounts may be required to execute a Manage Authorized Signers form, or other documentation, in order for us to process this request.

For bank use only:

Verify client

Date verified

FC number

Associate name **(Print first & last name)**