

THE EQUITY TRUST COMPANY

CHANGE OF BENEFICIARY FORM

WHEN TO USE THIS FORM



When you need to add, change or remove a beneficiary on your account.

Primary Beneficiary(ies) - The person(s) or entity you choose to receive your account upon your death. In the event that a designated primary beneficiary predeceases the account owner, their share will be shared equally between the remaining primary beneficiary(ies).

Contingent Beneficiary(ies) - The person(s) or entity you choose to receive your account if the primary beneficiary(ies) pass away (or the entity dissolves) before your death. In the event that a designated contingent beneficiary predeceases the account owner, the account will be shared equally between the remaining contingent beneficiary(ies).

INSTRUCTIONS AND GUIDELINES



When completing the Change of Beneficiary form please follow these guidelines:

- Please provide complete information for each beneficiary.
- Sign and date the bottom of the form and send original document to Equity Trust Company. **This document CANNOT be accepted by fax or email.**

CONTACT INFORMATION



PHYSICAL ADDRESS:

Equity Trust Company
225 Burns Road
Elyria, OH 44035

PHONE #:

(440) 323-5491

WEBSITE:

www.trustetc.com

For assistance, please
contact a member of your
First Class Service Team at:

TOLL FREE:

(877) 693-8208

Or e-mail questions to:

E-MAIL:

help@trustetc.com

SUBMISSION OPTIONS



REGULAR MAIL:

Equity Trust Company
P.O. Box 1319
Elyria, OH 44036

OVERNIGHT MAIL:

Equity Trust Company
225 Burns Rd
Elyria, OH 44035

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