

Update Personal Information

Use this form to update a client name, address, phone number or email address. The update(s) will be applied to all accounts in the same household.



Using **DocuSign**® is faster than emailing
this form to service@freedomadvisors.com.

Sign via DocuSign

Primary Account Owner

Additional Account Owner

Account Number(s)

Name Change

You must provide the relevant legal document associated with your name change.

First Name

Middle Name

Last Name

Address Change

Legal Address (no PO Box)

Address 1

Address 2

City

State

Zip

Mailing Address

Address 1

Address 2

City

State

Zip

Phone Number Change

Work

Mobile

Home

Email Address Change

Requests to change an email address cannot be submitted from the new email address.

Owner(s) Signature

Primary Account Owner/Trustee/Executor

Date (MM/DD/YYYY)

Co-Account Owner/Co-Trustee/Co-Executor

Date (MM/DD/YYYY)