



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 and guidelines* booklet.

Contact us
with questions

888-383-4483
donorservice@vanguardcharitable.org

1 Account information

Account number	Account name	Fund
A	The	

2 Identify changes

<p>Update current primary account advisor information - <i>This can be completed online</i> Complete sections 1, 2, 3, and 6</p>
<p>Replace primary account advisor Complete sections 1, 2, 3, and 6</p>
<p>Add, update or replace secondary account advisor Complete sections 1, 2, 3, and 6</p>
<p>Remove account advisor Complete sections 1, 2, 3, and 6</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 6</p>
<p>Change account name - <i>This can be completed online</i> Complete sections 1, 2, 4, and 6</p>
<p>Update account advisor address - <i>This can be completed online</i> Complete sections 1, 2, 5, and 6</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.

3a. Primary account advisor

Replace primary 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 primary 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.

Change current primary account advisor FROM:

Name <i>salutation, first, middle initial, last</i>	Last 4 digits of	SSN or	PIN
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Change primary 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	
Business	Home	Mobile	Business Home Mobile
Mailing address or P.O. box number			
City		State	Zip
Email address		Preferred contact method	
		Email	Phone Mail
Relationship to current primary account advisor			

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

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

3b. Secondary account advisor

Add secondary 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 secondary account advisor

Change secondary account advisor **FROM:**

Name <i>salutation, first, middle initial, last</i>	Last 4 digits of	SSN or	PIN
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Change secondary 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	
Business	Home	Mobile	Business Home Mobile
Mailing address or P.O. box number			
City		State	Zip
Email address		Preferred contact method	
		Email	Phone Mail
Relationship to current secondary account advisor			
Signature of new secondary account advisor			Date <i>mm-dd-yyyy</i>
X			

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

4 New account name

If applicable

Change account name **FROM:**

Account name	Fund
The	

Change account name **TO:**

Account name	Fund
The	

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

5 Change address

Enter new address below and indicate if this is a change for primary advisor, secondary advisor, or both.

Primary Advisor Secondary Advisor Both

Mailing address or P.O. box number		
City	State	Zip

6 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 and guidelines* booklet.

Current primary account advisor

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

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

Current secondary account advisor

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

Return information

Return this form and required documentation to Vanguard Charitable.

Email: donorservice@vanguardcharitable.org
We recommend encrypting the form and sharing the password separately.

Fax: 866-485-9414

Mail: P.O. Box 9509
 Warwick, RI 02889-9509

Registered, certified or overnight mail: 2670 Warwick Avenue,
 Warwick, RI 02889-9509