



CHANGE OF CUSTODIAN FORM

- Change applies only to the custodian information. Owner and type of account (IRA, Profit or Pension Plan) must remain the same
- **IMPORTANT:** Signatures of both the withdrawing custodian and the new custodian are required.
- If you have any questions about this form, please contact Pamela Bowles at (410)727-4083.

Withdrawing Custodian's Information:

Name of Custodian

For the Benefit of

Account # of Beneficiary

Withdrawing Custodian's Contact Information:

Name

Address

City, State, Zip Code

Phone # / E-mail

Withdrawing Custodian's Signature:

Name & Title

Date

New Custodian's Information:

Name of Custodian

For the Benefit of

Account # of Beneficiary

New Custodian's Contact Information:

Name

Address

City, State, Zip Code

Phone # / E-mail

New Custodian's Signature:

Name & Title

Date

To submit completed forms:

- Upload completed form via the "Upload Documents" tab on the ABR Investor Portal; or
- Mail or e-mail completed form to:

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