

Use this form to notify GeoWealth of any slight discrepancies in the way your name is listed on your custodial account and the account from which your assets are being transferred. For complete name changes, such as due to marriage or divorce, complete the GeoWealth Change of Personal Information form and include the appropriate legal documents such as marriage certificate or divorce decree.

1. Account Owner Information

Name on GeoWealth Account

Name on Account Being Transferred

GeoWealth Account #(s)

2. Signature and Date

The undersigned hereby authorizes Fidelity Investments ("Fidelity"), as the custodian for the account managed by GeoWealth Management LLC (the "GeoWealth Account"), to accept transactions under either name and certifies that the two names indicated above refer to one and the same person. I agree to indemnify and to hold GeoWealth and Fidelity harmless for any penalty or other liability resulting from this request. These instructions are to remain in full force and effect until GeoWealth has received written notification of its termination in such time and in such manner as to afford the parties a reasonable opportunity to act on it.

Name and Signature on GeoWealth Account(s):

Print Owner Name (First, M.I., Last Name)

Owner Signature

Date (MM/DD/YYYY)

Name and Signature on Outside Account(s):

Print Owner Name (First, M.I., Last Name)

Owner Signature

Date (MM/DD/YYYY)

3. Notary

State of _____, in the county of _____ . Subscribed and sworn
to before me by the above-named client, _____ who is personally known to
me or who has produced _____ as identification, that the foregoing statements were true and
accurate made of his/her own free act and deed, on this _____ day of _____, 20____.

Signature

Date (MM/DD/YYYY)

Commission Expiration Date (MM/DD/YYYY)