

**ACCOUNT UPDATE FORM**

Please fill up clearly in BLOCK LETTER, affix wet ink signature(s) and see the list of additional required documents to be attached upon submission to stockcerts@colfinancial.com. No digital signatures.

**ACCOUNT NUMBER**

v.10.2023

				-				
--	--	--	--	---	--	--	--	--

**MODIFICATION REQUEST (choose all that apply)**

<input type="checkbox"/> Change in Name	<input type="checkbox"/> Change in Signature	<input type="checkbox"/> Change in Citizenship	<input type="checkbox"/> Change in Email
---	--	--	--

PERSONAL INFORMATION	PRIMARY ACCOUNT HOLDER	SECONDARY ACCOUNT HOLDER
Last Name		
First Name		
Middle Name		
Country of Citizenship	<input type="checkbox"/> Philippines <input type="checkbox"/> USA <input type="checkbox"/> Others: _____	<input type="checkbox"/> Philippines <input type="checkbox"/> USA <input type="checkbox"/> Others: _____
Country of Residence	<input type="checkbox"/> Philippines <input type="checkbox"/> USA <input type="checkbox"/> Others: _____	<input type="checkbox"/> Philippines <input type="checkbox"/> USA <input type="checkbox"/> Others: _____
Civil Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Separated	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Separated

**FOR CHANGE IN EMAIL REQUEST ONLY**

Fill this out only if you cannot access your COL account to edit your email address. Once the update is processed, a reset of password will be triggered and sent to the new email address.

Updated Email Address <i>(Only if unable to access your COL Account)</i>	
---	--

**LIST OF ADDITIONAL REQUIRED DOCUMENTS**
**For Change in Name**

- Document to show proof of change in name (e.g. Marriage Certificate, Affidavit of one and the same person, Birth Certificate)
- One (1) Valid government issued ID with the updated name

**For Change in Signature and Change in Email**

- One (1) valid government issued ID with the updated signature

**For Change in Citizenship**

- One (1) valid passport
- Document to show proof of change in citizenship (e.g. Citizenship retention papers, Dual citizenship, Oath of Allegiance)
- COL's Individual Disclosure Form (Foreign Account Tax Compliance Act FATCA) for previous or current US persons

Note: For Joint accounts, both account holders would need to fill out, sign the form and submit the documents required.

**CONFORME & SPECIMEN SIGNATURES**

I hereby authorize COL Financial Group, Inc. (COL) to update my account details as indicated. I confirm that all the information in this FORM are true and correct. COL is authorized to verify the same and may consider any misrepresentation as sufficient ground for the rejection of this request. Should this request be denied, COL has no obligation to furnish the ground for such rejection. I consent to the processing of all information I provided or will provide to COL in the future. I hereby affix my signature to signify my conformance to all the foregoing.

PRIMARY ACCOUNT HOLDER SIGNATURE								SECONDARY ACCOUNT HOLDER SIGNATURE							
Signature ✓								Signature ✓							
Signature ✓								Signature ✓							
Signature ✓								Signature ✓							
Date Signed:    M   M   D   D   Y   Y   Y   Y								Date Signed:    M   M   D   D   Y   Y   Y   Y							

**FOR COL'S USE ONLY**

RECEIVED BY:	DATE RECEIVED:	APPROVED BY:	DATE APPROVED:	PROCESSED BY:	DATE PROCESSED:
--------------	----------------	--------------	----------------	---------------	-----------------