


## Before you begin


### Instructions

Use this form to change the legal name of an account owner (example: name change due to marriage or divorce). Please print in all capital letters and use black ink.

## Contact us

 **Website**  
jhinvestments.com

 **Phone**  
800-225-5291

 **Return instructions**  
See the end of this document for return instructions.

## 1. Type of request

Please enter your current account information.

\_\_\_\_\_  
Name currently on account (as listed on your quarterly statement) (First) (MI) (Last)

\_\_\_\_\_  
Mailing address

\_\_\_\_\_  
City State Zip code

\_\_\_\_\_  
Social Security number (required) Phone number Email address

### Fund and account number

**Note:** Your name will be updated on all accounts listed under the Social Security number provided above.

\_\_\_\_\_  
Fund name or number Account number

\_\_\_\_\_  
Fund name or number Account number

\_\_\_\_\_  
Fund name or number Account number

## 2. Name change


### Change is because (check one):

☐ Marital status has changed from single to married.

☐ Marital status has changed due to divorce.

☐ Other: \_\_\_\_\_ (Your signature must be Medallion signature guaranteed on page 2.)

### Change from:

 \_\_\_\_\_  
Please print **prior** name (First) (MI) (Last)

 \_\_\_\_\_  
Prior signature Date signed (MM/DD/YYYY)

### 3. Signature, taxpayer identification number, and certification

A change in your legal name constitutes a change of circumstance under federal tax law. You must provide a recertification of your taxpayer identification number (TIN) with your new name. Your TIN is your Social Security number. Please enter your Social Security number and sign below. You should also notify the Social Security Administration of your name change.

#### Certification required of U.S. persons only (including U.S. citizens, U.S. resident aliens, or other U.S. persons)

Under penalties of perjury, I certify that:

1. The number shown below is my correct taxpayer identification number,
2. I'm not subject to backup withholding because (a) I'm exempt from backup withholding, or (b) I haven't been notified by the Internal Revenue Service (IRS) that I'm subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I'm no longer subject to backup withholding,
3. I'm a U.S. citizen or other U.S. person, including a U.S. resident alien (as defined in the IRS Form W-9 instructions)

**Note:** Cross out item 2 above if you've been notified by the IRS that you're currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

Please note that, by signing this form, you declare that you make the above certifications under penalties of perjury. Under penalties of perjury, I certify the above statements. **The IRS doesn't require your consent to any provision of this document other than the certification required to avoid backup withholding.**

SIGN  
HERE

\_\_\_\_\_  
New signature (Please sign using your **new** name)

PRINT  
HERE

\_\_\_\_\_  
Social Security number as entered in Section 1 (**Required to update your account**)

\_\_\_\_\_  
Date signed (MM/DD/YYYY)

PRINT  
HERE

\_\_\_\_\_  
Print your **new** name

Medallion signature guarantee is required if you change your legal name and it is not due to a marriage or divorce. The Medallion signature guarantee may be obtained from a bank, broker-dealer, credit union (if authorized under your state laws), or a securities exchange. A notary public cannot provide a signature guarantee. We cannot accept a notarization in lieu of a signature guarantee.

**Place Medallion signature guarantee stamp in above box (if applicable).**  
Must be original and cannot be faxed.

### 4. Mail

Please submit your completed and signed form through one of the following:

☒ **Regular mail**

John Hancock Signature Services, Inc.  
P.O. Box 219909  
Kansas City, MO 64121-9909

**Express mail**

John Hancock Signature Services, Inc.  
801 Pennsylvania Avenue  
Suite 219909  
Kansas City, MO 64105-1307



John Hancock Investment Management Distributors LLC, Member FINRA, SIPC  
200 Berkeley Street, MA, 02116, 800-225-5291, [jhinvestments.com](http://jhinvestments.com)

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