



## Account Beneficiary Form

Please complete this form if you wish to add or change beneficiaries for an existing account. We also require a photocopy of the account holder's driver's license to complete this change.

**Current account you would like to change (*Joint account must be signed by both owners*)**

Account Owner(s)	Account Type	Account Number

**Designate these beneficiaries to the above account**

Beneficiary Name	Social Security No.	Date of Birth

I certify that I am an owner of the account above and authorize Amboy Direct to add the listed individual(s) as beneficiaries for a "revocable" trust (In Trust For).

Date \_\_\_\_\_ Authorizing Account Owner \_\_\_\_\_

Joint Account Owner \_\_\_\_\_

Please mail or fax the completed form.

**Fax:**  
(732) 591-0705

**Mail:**  
Customer Service Center  
Amboy Direct  
3590 U.S. Highway 9  
Old Bridge, NJ 08857

For further information, please call 1-877-222-6269.