Henry Wealth Management, LLC

Contact Information Change Form

Account Owner_____

Joint Owner_____

Custodians and account numbers to be affected:

☐ **Symmetry**	☐ **Pacific Life**	☐ **Alliance Bernstein**	☐ **SEI**	☐ **American Funds**

☐ **Allmerica**	☐ **NFP, Securities**	☐ **CollegeBound*fund***	☐ **Other**

Contact information

Old Address	City, State, Zip
New Address	City, State, Zip
Home Phone	Cell Phone
Work Phone	Email

Bank Information

Bank Name
Bank Address
Bank Phone Number
Bank ABA (routing) Number
Bank Account Number

Upon receipt of your request our office will be in contact with you in regards to the form to be signed if required (dependant on custodian being used) and any additional information which may be required. You can print and fax this form to our office at 412.838.0204 or call with any questions at 412.838.0200.