

**TRADITIONAL IRA  
CHANGE NOTICE (FORM 2309)**

**Please Print or Type**

\_\_\_\_\_  
CUID (Credit union will complete.)

\_\_\_\_\_  
Credit Union Name

\_\_\_\_\_-\_\_\_\_\_-\_\_\_\_\_  
Social Security Number  
*(If owner's Social Security number is being corrected,  
this should be the old, incorrect number.)*

\_\_\_\_\_  
IRA Suffix

\_\_\_\_\_  
IRA Owner's Name  
*(If owner's name is being changed or corrected,  
this should be the former or incorrect name.)*

\_\_\_\_\_  
Account Number  
*(If the account number is being changed or corrected,  
this should be the former or incorrect number.)*

**GENERAL INFORMATION**

This form can be used to make changes or corrections to IRA owner information or to change the status of an IRA. To make any other types of changes or corrections, use the appropriate form or report.

**OWNER INFORMATION CHANGE/CORRECTION**

To make changes to owner information, check the appropriate box(es) below and fill in the requested information.

- 1. \_\_\_\_\_  
New/Correct Name (First, Initial, Last) \_\_\_\_\_  
New/Correct Account Number
- 2. \_\_\_\_\_  
Correct Social Security Number
- 3. \_\_\_\_\_  
Correct Birth Date (MM/DD/YYYY)
- 4. \_\_\_\_\_  
New Address  
  
\_\_\_\_\_  
City, State, ZIP

**ACCOUNT STATUS CHANGE/CORRECTION**

To make a change to the status of an account, check the appropriate box below and fill in any requested information.

- 1. Permanently close this zero balance account as of \_\_\_\_\_  
(MM/DD/YYYY)
- 2. Reopen this previously closed account.

**CREDIT UNION'S SIGNATURE**

Any changes indicated on this Change Notice (Form 2309) were directed by the IRA owner.

**X** \_\_\_\_\_  
Credit Union Representative's Signature \_\_\_\_\_  
Date (MM/DD/YYYY)

**IRA OWNER'S SIGNATURE**

Note: We recommend obtaining the IRA owner's signature before making changes to an IRA.

**X** \_\_\_\_\_  
IRA Owner's Signature \_\_\_\_\_  
Date (MM/DD/YYYY)