IRA Account Maintenance Form

Important information about IRA account maintenance

Complete this form to change your name, permanent and/or mailing address, phone number, email address, contribution rate, annual increase, or bank information. You may also update this information online by logging into your account at www.RetireReady.NJ.gov.

If you are changing your legal name, in Section 3, your signature using your old name and your new name are required to be notarized. In place of a notarization acknowledgement, you have the option to submit a signed letter of instruction with supporting legal documentation (i.e. marriage certificate, court order, divorce documentation) for this change.

The updates/changes on this form override all previous elections for this IRA.

Contact us:
9am to 6pm Eastern Time, M-F

Employer assistance:
1-855-929-4387

Employee assistance:
1-844-553-4043

Completed forms should be mailed to:
RetireReady NJ PO
Box 534450
Pittsburgh, PA 15253-4450

Overnight address:
RetireReady NJ
500 Ross Street, 154-0520
Pittsburgh, PA 15262

RetireReady.NJ.gov

1 IRA owner information (All fields required)

If you are updating your information, enter the information that is currently on file in this section and the new information in Section 3.

__ __ __ __ __ __ __ __ __ __

Account number

_____ _____
IRA owner legal name (First) (M.I.)

_____
IRA owner legal name (Last)

__ __ __ – __ __ __ – __ __ __ __
Telephone number (In case we have a question about your Account. If you are updating your phone number, enter the number you have on file in this section and the new number in Section 3.)

_____
Employer name (If you contribute through more than one employer and want to change your contribution rate or automatic annual increase election, you must submit a separate form for each employer.)

2 Account updates or changes

Check the box(es) to indicate which section(s) you plan to update or change.

- ◯ IRA owner information – Section 3
- ◯ Bank information – Section 4
- ◯ Contribution rate – Section 5

3 Update IRA owner information

If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your RetireReady NJ IRA.

If you are changing your name, you must also provide a notarization acknowledgement below or legal document(s) verifying the name change.

IRA owner legal name (First) (M.I.)

IRA owner legal name (Last)

Email address

Physical address (We cannot accept a PO box)

City State ZIP code

Mailing address if different from above (This address will be used as the address of record and for all mailings)

City State ZIP code

Telephone number

continued from page 2

Notarization acknowledgement (Required for name changes to the owner of an existing account only)

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the IRA account.

Only sign if you are in the presence of a notary public or other officer providing notarization.

_____ _____

Former signature of account owner
(For name change only)

Current signature of account owner

_____ _____

STATE OF

COUNTY OF

The foregoing instrument was acknowledged before me by means of

☐ **physical presence** or ☐ **online notarization**,

This _____ day of _____, 20___, by _____

_____

Signature of Notary Public - State of _____

Circle one:
Personally Known OR **Produced Identification**

_____

Type of Identification Produced

Print, Type, or Stamp Commissioned Name of Notary Public

4 Update bank information

Important: By signing this form, you agree and confirm that your ACH transaction will not involve the branches or offices of a bank or other financial services company located outside the territorial jurisdiction of the United States.

Current marital status

◯ Add ◯ Delete bank information indicated below ◯ Delete all current bank information and add new bank information below

Financial organization name: _____

continued from page 3

__ __ __ __ __ __ __ __ __

Financial organization routing number

__ __ __ __ __ __ __ __ __ __ __ __ __ __ __

Financial organization account number

Account type (Select one)

◯ Checking ◯ Savings

Note: The routing number is usually located on the bottom left corner of your checks. You can also ask your financial organization for the routing number.

◯ Add ◯ Delete bank information indicated below ◯ Delete all current bank information and add new bank information below

Name

__ __ __ __ __ __ __ __ __

Financial organization routing number

__ __ __ __ __ __ __ __ __ __ __ __ __ __ __

Financial organization account number

Account type (Select one)

◯ Checking ◯ Savings

Note: The routing number is usually located on the bottom left corner of your checks. You can also ask your financial organization for the routing number.

5 Update contribution rate

If you wish to change your contribution rate, enter the percentage of your pay check you wish to contribute as a whole number. Note: *Your contributions to all of your Roth IRA are limited to $7,000 ($8,000 if 50 or older) for 2024 depending on your income. See IRS Publication 590A for more information.*

__ __ __%

New contribution rate

6 Signature

I certify that I am the account owner and verify the information above is accurate. I assume responsibility for any consequences that may result from these changes and I agree that RetireReady NJ, the custodian, or the program administrator are not responsible for any consequences that may arise from executing the changes outlined in this form.

Signature of IRA owner

__ __ – __ __ – __ __ __ __

Date (mm/dd/yyyy)