

Phone: 800-462-8328 ext. 4116, option 1 • Fax: 714-258-4051 • SchoolsFirstRP.com

**P.O. Box 11547, Attn: Retirement Planning, RH3, Santa Ana, CA 92711**

Submission of this form effectively updates the address and/or name on record for your SchoolsFirst/Nationwide Retirement Builder Plan only.

**NOTE:** Please allow 5 business days for updates to your account to reflect on [www.nationwide.com](http://www.nationwide.com).

**Participant Information**

Name: \_\_\_\_\_

SSN (required): \_\_\_\_\_ Primary Phone<sup>1</sup>: \_\_\_\_\_

School District: \_\_\_\_\_ Email: \_\_\_\_\_

How would you like to be contacted if additional information is required?  Email  Phone

<sup>1</sup>Nationwide strives to provide excellent customer service to our Members. By providing your telephone number, you authorize Nationwide to contact you via telephone using automated technology to assist you with your account.

**Address Update**

**Previous Mailing Address:**

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

**New Mailing Address:**

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

**Physical Address (Required if changing mailing address to P.O. Box):**

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Email: \_\_\_\_\_ Primary Phone: \_\_\_\_\_

**Name Change**

**Include documentation of name change. (i.e. Driver's License, Marriage Certificate, divorce decree or court order)**

Current Name: \_\_\_\_\_

New Name: \_\_\_\_\_

Documentation provided as evidence of name change: \_\_\_\_\_

**Signatures**

I certify that I am the proper party to authorize and make updates to the above information. I have provided the proper documentation and I authorize SchoolsFirst to make the necessary updates to my Nationwide Retirement Builder Plan. Note: This form will not update your SchoolsFirst FCU Membership(s).

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Custodian Signature**

Custodian Approval:

Name: \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Form Return**

Fax: 714-258-4051 Email: [retirementadvisors@schoolsfirstfcu.org](mailto:retirementadvisors@schoolsfirstfcu.org)

Mail: SchoolsFirst, P.O. Box 11547 Attn: Retirement Planning, RH3 Santa Ana, CA 92711