

# Instructions for Changing Your Account Ownership

Do not use for an IRA

## Instructions

The instructions below will help you change the ownership of your existing account. In most cases, you will need to have your signature(s) authenticated (Medallion Signature Guarantee, SVP or Notary) to change the ownership. In some situations, we will need additional documentation.

Please note that current banking instructions and account options will remain on the account with this change of ownership, unless otherwise noted. To provide new banking instructions, attach a voided check or deposit slip to this form. To update account options, complete and attach the Account Options Form. All forms can be downloaded from the Funds' website at [dodgeandcox.com](http://dodgeandcox.com).

If you have any questions (e.g., appropriate legal documentation, cost basis implications) or if your situation is not addressed, please call Client Services at 800-621-3979 for assistance.

The Change of Ownership Form has four parts and addresses various situations. The following instructions correspond to **Part 3** of the form.

Note: A change in account ownership may result in the unlinking of the account for statement mailings and online access. Please use the **Account Linking Form** if you would like to link accounts with different Tax Identification or Social Security Numbers.

### Part 3A. Change from an Individual Account to a Joint Tenant Account

- Current account owner must obtain a **Medallion Signature Guarantee** in Part 4.
- New account owner must provide signature in Part 5.

### Part 3B. Change from a Joint Account to an Individual Account because of:

#### Death of an Account Owner (Joint Tenants with Right of Survivorship)

- Surviving account owner(s) must obtain a **Medallion Signature Guarantee** in Part 4, OR provide a certified death certificate.
- If required by law in your state of residence, provide a state inheritance tax waiver.

#### Divorce

- Account owners must obtain a **Medallion Signature Guarantee** in Part 4.
- Please provide a **Medallion Signature Guarantee** letter of instructions and a completed **Account Application** if transferring a percentage of the account to a new owner.

### Part 3C. Transfer of Ownership

- Current account owner must obtain a **Medallion Signature Guarantee** in Part 4.
- Recipient must provide a completed Account Application if transferring to a new account.









