HERITAGE INVESTMENT SERVICES FUND
Investing for a Higher Purpose
Matthew 16:18

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PERSONAL JOINT TENANT CHANGE FORM

Section A - Add/ Replace/ Remove Joint Tenant with Right of Survivorship (JTROS)*

Check One: ☐ Add a JTROS ☐ Replace current JTROS ☐ Remove a JTROS

You may register only one JTROS per Promissory Note.

Primary Account Owner Information

Name _____

Investment Number(s) Affected By This Change_____

_____

New Joint Tenant Information

Name	Mailing Address
Social Security No.	Address Cont.
Date of Birth (mm/dd/yyyy)	City State Zip
Telephone No.	Email

Previous JTROS Information (if removing or replacing a JTROS) *(If you are removing or replacing a JTROS due to death, please attach an original death certificate)*

Name	Mailing Address
Social Security No.	Mailing Address Cont.
Date of Birth (mm/dd/yyyy)	City State Zip
Telephone No.	Email

Section B - Signatures

Primary Account Owner/UTMA Custodian Signature	***Date***
New/Current JTROS Signature	***Date***
Previous JTROS Signature	***Date***

***For joint accounts:** The primary account owner's name and social security number listed will be used for tax reporting purposes. Heritage Investment Services Fund, Inc. (HIS Fund) limits joint accounts to the primary account owner and one joint owner. Both the primary and joint tenant account owners must sign this form. However, in the discretion of HIS Fund, only the signature of one of the account owners may be required for transactions with respect to a joint account, including withdrawals, renewals, reinvestment and address changes. HIS Fund may act at any time on the instructions of either account owner and withdrawal checks may be made payable to either named account owner. Account statements and other correspondence will be sent only to the address of the primary account owner. Please consult with your tax advisor regarding possible tax implications of joint accounts.