Cash Advantage®
An AssetMark Trust Company Service

TheBancorp®

REGISTRATION CHANGE REQUEST FORM FOR A DEPOSIT ACCOUNT

This form is for the permitted uses stated below, in connection with an existing deposit account maintained by The Bancorp Bank, N.A. (Bank).

Permitted uses of this form:	Not permitted using this form
• Account registration/title updates • Individual-to-trust conversions • Trust registration updates due to an amendment, restatement, or other documented trust change • Tax Identification Number (TIN) change on an existing trust account are permitted only when changing to the existing account holder's spouse's SSN, when permitted by Bank policy.	• Adding or removing account owners • Legal name changes for an individual • Address, phone, or email updates • TIN changes not permitted by Bank policy • Any ownership change requiring a new account

Incomplete forms will delay processing and may be returned.

PART 1: Account information

Account number

Account title

Account type: ◯ Checking ◯ Savings ◯ Money Market

PART 2: Requested change type

Please complete the applicable section.

A. Registration/title change

Documentation required to complete a registration/title change for an account:

• A copy of the relevant pages of the restated trust, certification of trust, or other legal document showing the new trust name and effective date.
• Certification of Trust (or equivalent summary document) reflecting the updated trust name and current trustees.

◯ Account title change

New account title

Reason for change

B. Individual account to trust conversion

Primary account holder for the individual account **must** be a trustee on the trust account.

TIN **must** remain that of the primary account holder on the individual account. **If trust has its own TIN, a new account application is required.**

◯ Convert an individual account to a trust account

Type of trust: ◯ Revocable trust ◯ Irrevocable trust

Trust name

Reason for change

Note: A copy of the relevant pages of the Trust Agreement or Certification of the Trust are required to complete this change, and the trust document that appoints the Trustee(s) and all signature and notary pages.

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C. TIN change (Spouse only)

◯ Tax identification number (TIN) change from account owner to account owner's spouse

Account owner's spouse's name | TIN of account owner's spouse

Note: A new deposit account application is required for a TIN change request for someone other than account owner's spouse.

Required to complete a TIN change:

- New IRS Form W-9 completed with the new TIN.
- Documentation supporting the change, such as:
  - Death of the original grantor/spouse
  - Amendment or restatement of the trust
  - Change in ownership or grantor status under the trust terms
  - Other legal documentation demonstrating why tax reporting should now be under the new TIN

PART 3: Account activity

Please indicate the total anticipated transaction volume and dollar amounts of account activity. The estimates should include both incoming and outgoing transactions. To avoid a delay in processing, please be sure all sections are completed.

Service/type of transaction	Estimated monthly activity		Estimated monthly total	
ACH	◯ 0 ◯ 4-10 ◯ 16-20	◯ 1-3 ◯ 11-15	◯ $0 ◯ $501-1,000 ◯ $2,501-5,000	◯ $1-500 ◯ $1,001-2,500 ◯ $5,001+
Wire transfers	◯ 0 ◯ 4-10 ◯ 16-20	◯ 1-3 ◯ 11-15	◯ $0 ◯ $501-1,000 ◯ $2,501-5,000	◯ $1-500 ◯ $1,001-2,500 ◯ $5,001+
Checks	◯ 0 ◯ 4-10 ◯ 16-20	◯ 1-3 ◯ 11-15	◯ $0 ◯ $501-1,000 ◯ $2,501-5,000	◯ $1-500 ◯ $1,001-2,500 ◯ $5,001+
Cash (via ATM)	◯ 0 ◯ 4-10 ◯ 16-20	◯ 1-3 ◯ 11-15	◯ $0 ◯ $501-1,000 ◯ $2,501-5,000	◯ $1-500 ◯ $1,001-2,500 ◯ $5,001+
Mobile deposit	◯ 0 ◯ 4-10 ◯ 16-20	◯ 1-3 ◯ 11-15	◯ $0 ◯ $501-1,000 ◯ $2,501-5,000	◯ $1-500 ◯ $1,001-2,500 ◯ $5,001+

Will this account be used for international transactions? ◯ No ◯ Yes

If yes, list up to 3 non-U.S. countries where transactions may be sent or may originate:

Country 1 | Country 2 | Country 3

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PART 4: ATM/debit card

Would you like a new debit or ATM card issued? ◯ Yes ◯ No

If yes, select one option below:

◯ Debit card (Checking accounts) ◯ ATM card (Savings and money market accounts)

If a card is requested, a unique Personal Identification Number (PIN) will be mailed to the account owner for the debit or ATM card. The recipient may use the preselected PIN or change it to a personally selected PIN. To change the PIN, please have the card number and current PIN available when calling the telephone number printed on the card.

PART 5: Checks

◯ Yes, order a supply of checks, with the new account name/title and containing the street address of the existing account owner.
◯ No, do not order a supply of checks.

Part 6: Signature - required

I certify that the information provided herein is accurate and that I am authorized to request the account change(s) described herein.

Signature _____ Date (mm/dd/yyyy) _____

Print name _____

Signature _____ Date (mm/dd/yyyy) _____

Print name _____

Please mail or fax this completed form to:

Cash Advantage
Attn: Wire Transfer Department
409 Silverside Road, Suite 105
Wilmington, DE 19809
Fax: 302.791.5676

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