

RETURN INSTRUCTIONS



If you have Bank Accounts or Bank Accounts and Investments, return this form with any attached documents using one of these methods:

Upload/Secure Message

Log in at ally.com, choose Email / Bank Accounts / Send a New Secure Message.

Mail

Ally Bank
PO Box 13625
Philadelphia, PA 19101

Fax

Subject Line: Operations
Fax Number: 866-699-2969

If you have Investments, return this form with any attached documents using one of these methods:

Online

Log in and select Investments then choose Document Upload.

Mail

Ally Invest
PO Box 30248
Charlotte, NC 28230

Fax

Subject Line: Operations
Fax Number: 866-699-0563

NAME CHANGE REQUEST



Use this form to change your legal name on your account(s).

Provide one of these documents:

- A copy of your signed Social Security Card showing your new name or
- A copy of a Marriage Certificate or court document showing your new name

Account Owner

FIRST NAME (PRINT)

M.I. (PRINT)

LAST NAME (CURRENT NAME ON ACCOUNT) (PRINT)

OCCUPATION

EMPLOYER

ACCOUNT NUMBERS

NEW NAME ON ACCOUNT

Additional Services (Ally Bank Only)

Check all that apply

Order checks with my new name

Order a debit card with my new name

Signature Verification and Agreement

By signing below you are giving Ally permission to make the necessary modifications to the account(s) listed.

ACCOUNT HOLDER'S PRIOR SIGNATURE

DATE

ACCOUNT HOLDER'S NEW SIGNATURE

DATE

Certification Of Taxpayer Identification Number

Complete and sign the attached Certification of Taxpayer Identification Number form if you have not certified your Taxpayer Identification Number.

Ally Financial Inc.

Securities products and services are offered through Ally Invest Securities LLC, member FINRA and SIPC. Advisory products and services are offered through Ally Invest Advisors, Inc, an SEC registered investment advisor. Products offered by Ally Invest Advisors and Ally Invest Securities are **NOT FDIC INSURED, NOT BANK GAURANTEED, and MAY LOSE VALUE.** Questions? Call 1-855-880-2559 or visit ally.com

Ally Bank, Member FDIC

Questions? Call 1-877-247-2559 or visit ally.com
UPDATED 06/2020

CERTIFICATION OF TAXPAYER IDENTIFICATION NUMBER



FORM W9 TAXPAYER IDENTIFICATION NUMBER (TIN) CERTIFICATION (Not applicable for Non-Resident Aliens)

(For individuals, the TIN is your Social Security Number or individual Tax Identification Number (TIN) which should match the first name listed on the account and will be used for tax reporting purposes. For other entities, it is your Employee Identification Number.)

I. SOCIAL SECURITY NUMBER OR EMPLOYER IDENTIFICATION NUMBER

II. Certification - Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (including a U.S. Resident Alien), and
4. I am exempt from Foreign Account Tax Compliance Act Reporting.

Backup Withholding Instructions

You must check off this box if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

SIGNATURE

PRINT NAME

DATE

CUSTOMER NUMBER (INTERNAL USE ONLY)

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