

For assistance, please contact us at 800-243-1574 or visit our website at Virtus.com

**1. Important Information**

- If your account has the Checkwriting Privilege, please make sure that all outstanding checks are paid before submitting this form. When we change your name on the account, we will send you a new book of checks. Additionally, we will forward a Checkwriting Application for your completion so that we can have an updated signature card on file.
- If the bank account information maintained on your account has changed please contact us.
- Your account number will remain the same. If you wish to change account ownership (e.g. from an UGMA custodial account to a regular individual account), please contact us at the telephone number listed above for additional requirements.

**2. Account Information**

Former Name	U.S. Social Security Number
Current Name	Daytime Telephone Number
Address	Email Address
City, State, ZIP Code	Fund and Account Number(s)

Check here if this is an address change.

**3. Substitute W 9 Form**

Under penalties of perjury, I certify that: (1) the number shown on this form is my correct taxpayer identification number; 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 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. person (including a U.S. resident alien); and (4) The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Cross out item 2 above 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.

NOTE: The IRS does not require your consent to any provision on this application other than the certification required to avoid backup withholding.

If I am a nonresident alien, I am required to complete the appropriate Form W-8 to certify my foreign status. I understand that I am not under penalties of perjury certifying the above information

**4. Authorizing Signatures**

By signing below, I request that my account(s) with Virtus Mutual Funds be updated to reflect my current name. For the purpose of inducing Virtus Mutual Funds, their agents and affiliates to act upon these instructions, I agree to fully indemnify and hold harmless Virtus Mutual Funds, their agents, affiliates, officers, directors, employees, successors and assigns from and against any and all losses, liabilities, claims and costs of whatever kind (including reasonable attorney's fees) resulting from or caused by transactions made in accordance with these instructions.

Print Name – Former Name	Signature – Former Name	Date
Print Name – Current Name	Signature – Current Name	Date

**5. Notarization** The signatures in Section 4 must be notarized.

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_ before me, personally appeared \_\_\_\_\_ known to me or satisfactorily proved to be the person whose names are subscribed to within this instrument and acknowledges the he or she executed the same for the purposes therein contained.

NOTARY PUBLIC (affix Notarial Seal) \_\_\_\_\_ My Commission Expires: \_\_\_\_\_