



Regular mail:
ESG Managers® Portfolios
PO Box 55389
Boston MA 02205-5389

Overnight mail:
ESG Managers® Portfolios
c/o BFDS
30 Dan Road, Suite #55389
Canton, MA 02021-2809
Telephone: 888.374.8920

Name Change Form

If you have any questions please call 888.374.8920 between 8AM and 6PM ET M-F.

1. Current Account Information

Account Number		Share Class	
Owner's First Name (or Trustee, Custodian, etc.)	Middle Initial	Last Name	Social Security/Tax ID No.
Joint Owner's First Name (or Trustee, Custodian, etc.)	Middle Initial	Last Name	Social Security/Tax ID No.
Mailing Address	City	State	Zip Code
()			
Contact Telephone	Email Address		

☐ Check here if contact information above is new.

2. Certification

I hereby certify that my name has been changed and the two names listed below are one and the same person. Please change my account registration to reflect my legal name change:

Print former name: _____

Print new name: _____

3. Account Owner Signature and Guarantee

To complete this request your signature must be guaranteed with a Signature Validation Program (SVP) Stamp.

Signature	Date
-----------	------

The Signature Validation Program (SVP) Stamp is intended to provide a signature guarantee for those transactions considered non-financial in nature. The SVP Stamp on a document assures the signature on the document is genuine, the signer was known by or satisfactorily identified by the guarantor and the signer had the authority to sign the document. In the event the bank or financial institution does not offer the SVP Stamp, a Medallion Guarantee Stamp will be accepted.

The SVP Stamp and the Medallion Guarantee Stamp may be obtained from an eligible guarantor of the Medallion Guarantee Program, which includes commercial banks, trust companies, savings associations and credit unions, as defined by the Federal Deposit Insurance Act. Also included are member firms of a domestic stock exchange. Non bar-coded guarantees or stamps from a Notary Public are not acceptable. All bar-coded guarantees must be legible. For those signing in a capacity other than the account owner, a capacity must be indicated beside or beneath the signature. Prior to signing, contact the guarantor to determine what documentation needs to be provided.

SVP/MSG Stamp (required)