



Joint Account Holder Change

For John Hancock Safe Access Accounts

Instructions

Use this form to add or remove a Joint Account Holder on your John Hancock Safe Access Account. Joint held accounts will act as a joint tenancy with right of survivorship, where upon the death of one owner, the living owner is deemed the sole owner on the account. All signatures must be notarized. **Forms incomplete, unsigned, or missing the notarization will not be processed.** You can fax or mail the completed form to John Hancock using the contact information listed in the last section of this form.

To add a Joint Account Holder: Complete Sections 1 and 2.

To remove a Joint Account Holder: Complete Sections 1 and 3 (The Primary Account Holder cannot be removed from the account).

A new Joint Account Holder must also submit a properly completed and signed IRS Form W-9. If an Account Holder is not a U.S. person, they must submit the version of IRS Form W-8 that applies to them. Forms W-9 and W-8 and their instructions are available on the IRS website at www.irs.gov.

1. Safe Access Account Information

Primary Account Holder Information

Account Number	Phone Number		
Name (First)	(MI)	(Last)	
Address (Street)	City	State	Zip Code

Existing Joint Account Holder Information (if applicable)

Name (First)	(MI)	(Last)	
Address (Street)	City	State	Zip Code

2. Adding a Joint Account Holder

Complete this section if you would like to add a Joint Account Holder to your Safe Access Account.

IMPORTANT INFORMATION: We are required by federal law, to obtain, verify, and record information that identifies each person listed as an Account Holder on the Safe Access Account. You must provide the information requested below.

Name (First)	(MI)	(Last)	
Address (Street)	City	State	Zip Code
Social Security Number (or Tax ID)	Primary Phone Number	Date of Birth (MM/DD/YYYY)	

I hereby request to add a Joint Account Holder, and I understand that I am granting an ownership interest in the account to this new Joint Account Holder and that all Joint Account Holders have the right to access funds in, and initiate transactions available on, the account without approval or consent from any other Joint Account Holder. Upon completion of this ownership change, the account will be changed from an individual account to a jointly owned account with right of survivorship.

**SIGN
HERE**

Signature of Account Holder

Today's Date (MM/DD/YYYY)

Title

**SIGN
HERE**

Signature of Additional Joint Account Holder

Today's Date (MM/DD/YYYY)

Title

If you are signing on behalf of another individual or entity, please indicate your title (e.g., Conservator, Trustee, Executor, Guardian, Attorney-in-Fact/POA, Corporate Officer). If there is more than one Trustee, all must sign.

2. Adding a Joint Account Holder (continued)

County of _____ State of _____

On this _____ day of _____, _____ before me personally came _____

and _____, known to me (or satisfactorily proven) to be the person/people described in and who executed the foregoing instrument, and he/she/they duly acknowledge to me that he/she/they executed the same.



Notary Public Signature Stamp
(If applicable)



Notary Public Signature Stamp
(If applicable)

3. Removing a Joint Account Holder

This section would be completed if a Primary Account Holder (who cannot be removed from the account, if living) and living Joint Account Holder agree to remove the Joint Account Holder from your Safe Access Account. If you intend to remove a Joint Account Holder who is deceased, do not complete this section. Instead, please contact John Hancock and complete the Claim Form for John Hancock Safe Access Accounts.

Name (First) _____ (MI) _____ (Last) _____

Address (Street) _____ City _____ State _____ Zip Code _____

I/We understand that by removing this Account Holder, it will relinquish their ownership interest in the account and they will no longer have the right to access funds or act on behalf of this account.

Both the Account Holder and Joint Account Holder must sign.

**SIGN
HERE**

Signature of Account Holder

**SIGN
HERE**

Signature of Joint Account Holder

Today's Date (MM/DD/YYYY)

Today's Date (MM/DD/YYYY)

Title

Title

If you are signing on behalf of another individual or entity, please indicate your title (e.g., Conservator, Trustee, Executor, Guardian, Attorney-in-Fact/POA, Corporate Officer). If there is more than one Trustee, all must sign.

County of _____ State of _____

On this _____ day of _____, _____ before me personally came _____

and _____, known to me (or satisfactorily proven) to be the person/people described in and who executed the foregoing instrument, and he/she/they duly acknowledge to me that he/she/they executed the same.



Notary Public Signature Stamp
(If applicable)



Notary Public Signature Stamp
(If applicable)

Contact Information

Mailing Address:
PO Box 55979
Boston, MA 02205-5979

Overnight Deliveries:
30 Dan Road, Suite 55979
Canton, MA 02021-2809

To fax this form:
1-617-572-5007

Safe Access Service Center:
1-800-248-6110

Safe Access Account Website:
www.johnhancock.com/saa