

# Morgan Stanley Funds Name Change Request

**Notice:** This form is intended for Shareholders who own Morgan Stanley mutual fund shares directly with the fund. If you own shares of a Morgan Stanley mutual fund through a Financial Intermediary, including Morgan Stanley Wealth Management, please contact your Financial Intermediary for instructions on updating your account.

|  |   |   |
|--|---|---|
| <b>Regular Mail</b><br>Morgan Stanley Funds<br>P.O. Box 219804<br>Kansas City, MO 64121-9804   | <b>Overnight Mail</b><br>Morgan Stanley Funds<br>801 Pennsylvania Ave, Suite 219804<br>Kansas City, MO 64105-1307 | <b>For assistance:</b><br>800-869-6397<br>9:00 a.m. - 5:30 p.m. ET, Mon-Fri |
| <b>Important Instructions:</b> To use a fillable form in Windows Edge, please click on the three dots at the upper right of the browser and select "Open with Internet Explorer" which will make the fillable sections appear. |   |   |

## Part 1. Account Information

|                |                        |
|----------------|------------------------|
| Registration   | Phone Number           |
| Account Number | Social Security Number |

## Part 2. Reason for Name Change and Certification

This name change is due to: ☐ Marriage    ☐ Divorce    ☐ Adoption    ☐ Court Order

☐ Other \_\_\_\_\_

It is hereby certified that the names appearing below are one in the same person.

|                |
|----------------|
| Print Old Name |
| Sign Old Name  |
| Print New Name |
| Sign New Name  |

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).
- 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions:** You must 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.

Check appropriate box for federal tax classification (REQUIRED):

- ☐ U.S. Citizen (including U.S. resident alien)      ☐ Trust/Estate Exempt Payee
- ☐ Limited Liability Company: Enter tax classification (C=C corporation, S=S corporation, P=partnership): \_\_\_\_\_
- ☐ C Corporation      ☐ S Corporation      ☐ Other: \_\_\_\_\_

|  |      |
|--|------|
| Signature (New Name)                     | Date |
| Signature of Joint Owner (if applicable) | Date |

Part 3. Notary Public

Guarantees both the old and new names

The signature(s) and Notary Public must be in original form, photocopies and fax copies are not acceptable.

Please attach Notary Stamp here

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