

Ford Interest Advantage

Information Change Request



INSTRUCTIONS: Please print legibly. Complete applicable information and return to the mailing address on page 3. Incomplete forms cannot be processed. See page 3 for details.

90

Your Ford Interest Advantage Number

Primary Owner's Social Security Number/Tax ID Number

Today's Date

Address Change

To change the registered address and telephone number on your Ford Interest Advantage, **ALL REGISTERED OWNERS are required to provide Authorized Signatures on page 2.**

New Residential Address (P.O. Box will not be accepted)

City

State

ZIP Code

Home Phone w/Area Code

Work Phone w/Area Code

Ownership Change(s)

Please read "USA PATRIOT Act Notice" on page 3.

Add Owner

(All owners will be deemed to be Joint Tenants with Right of Survivorship unless you indicate otherwise by attaching a letter of instruction.)

Print Name to be **Added**

Signature of **New Owner**

Social Security Number (required)

Date of Birth (required)

Street Address (P.O. Box will not be accepted)

Apt./Suite

City

State

ZIP Code

Home Phone with Area Code

Work Phone with Area Code

Occupation

Annual Income

Driver's License Number

Mother's Maiden Name

Remove Owner

Print Name to be **Removed**

Signature of **Former Owner**

Name Change

Print **New Name**

Signature of **New Name**

Social Security Number (required)

Date of Birth (required)

New Social Security/Tax ID Number Attach new W-9 form.

Change Registration of Ford Interest Advantage to a Trust Ownership

Please read Changing Registration of Ford Interest Advantage to a Trust Ownership on page 3.

Title of Trust (attach trust pages with trust title, date, trustee(s), with signed name and successor trustees):

Date of Trust

Trust Tax ID Number

Trustee #1 Name

Trustee #2 Name

Trustee #1 Social Security Number (required)

Date of Birth (required)

Trustee #2 Social Security Number (required)

Date of Birth (required)

Driver's License Number

Driver's License Number

Street Address (P.O. Box will not be accepted)

Apt./Suite

Street Address (P.O. Box will not be accepted)

Apt./Suite

City

State

ZIP Code

City

State

ZIP Code

Home Phone with Area Code

Work Phone with Area Code

Home Phone with Area Code

Work Phone with Area Code

Authorized Signature(s) and Signature Guarantee(s)

ALL CURRENTLY REGISTERED OWNER(S) must sign below to authorize and initiate any elections or selections made to page 1. Please make certain all Signature Guarantees are Medallion Signature Guaranteed stamped, where required, by a participating or designated financial institution.

ALL CURRENTLY REGISTERED OWNERS are required to provide Authorized Signature(s) to make changes. A Signature Guarantee(s) is required for Ownership Changes (Add/Remove Owner Name). A Signature Guarantee is designed to protect you and Ford Interest Advantage against improper transactions or requests by unauthorized persons. A Medallion Signature Guaranteed Stamp can be obtained from most commercial banks, savings banks or credit unions. The Medallion Signature Guaranteed Stamp must be signed by an authorized signatory of the financial institution and the statement "Signature Guaranteed" must appear with the authorized signatory signature. **A NOTARIZED**

SIGNATURE IS NOT ACCEPTABLE.

I (we) hereby authorize the Ford Interest Advantage processing agent, The Northern Trust Company ("Agent"), to initiate debit entries and, if necessary, credit entries as indicated above. I (we) further agree that if any such debit entry is dishonored, whether with or without cause and whether intentionally or inadvertently, Ford Interest Advantage and The Northern Trust Company shall be under no liability whatsoever. If there are two or more depositors, our obligations are joint and several. This authorization will remain in full force until I (we) have notified the Ford Interest Advantage processing agent, The Northern Trust Company, in writing to cancel it, and have given the agent sufficient time to act.

Signature of Primary Owner

Medallion Signature Guaranteed Stamp*

Date

Signature of Joint Owner (if applicable)

Medallion Signature Guaranteed Stamp*

Date

Signature of Joint Owner (if applicable)

Medallion Signature Guaranteed Stamp*

Date

Signature of Joint Owner (if applicable)

Medallion Signature Guaranteed Stamp*

Date

Mailing Address for All Ford Interest Advantage Changes

Regular Mail: The Northern Trust Company
Ford Interest Advantage
P. O. Box 75936
Chicago, IL 60675-5936

Overnight Mail: The Northern Trust Company
Ford Interest Advantage
801 South Canal Street, C2N
Chicago, IL 60607

For enrollment packages and Information, visit our Web site, ford.com/finance/investor-center/ford-interest-advantage or call 1-800-462-2614 to request a package to be mailed.

Ownership Changes/USA PATRIOT Act Notice

To add an owner, the signature(s) of the current owner(s) must be Signature Guaranteed and a specimen signature for the new owner is required along with their Social Security number, date of birth, current address and phone number. **To remove an owner**, the signature of the owner to be removed must be Signature Guaranteed. **To remove an owner due to divorce**, the signature of the owner to be removed must have a Signature Guarantee. The divorce decree may be substituted only if the Ford Interest Advantage is specified as a part of the settlement. **To remove an owner due to death**, a certified copy of the death certificate, a completed W-9 form if the Social Security number will change, and a letter of instruction signed by the surviving owner are required. **If the deceased is the only owner**, then the executor must sign the letter of instruction, obtain a Signature Guarantee, submit a certified copy of the death certificate, and submit a copy of the certified letter of Testamentary or other letters of authority. Wills are not acceptable. **To change your name**, a copy

of the marriage certificate, or original or certified copies of other legal documents substantiating the name change must be submitted. **To change a Social Security/Tax ID number** requires a completed W-9 form. **Additional Change Request forms** are available at ford.com/finance/investor-center/ford-interest-advantage or by calling 1-800-462-2614.

USA PATRIOT ACT NOTICE: To help fight the funding of terrorism and money-laundering activities, the U.S. government has passed the USA PATRIOT Act, which requires banks, including the Ford Interest Advantage processing agent bank, to obtain, verify and record information that identifies persons who engage in certain transactions with or through a bank. This means that, in order for us to process a Ford Interest Advantage application or Change Request form for you, we will need the name, residential or street address (no P.O. Boxes), date of birth and Social Security number or other tax ID of **ALL PERSONS** listed on the application or Change Request form.

Changing Registration of Ford Interest Advantage to a Trust Ownership

In order to change the registration of your Ford Interest Advantage to a trust ownership, complete the Authorized Signature Guarantee section with the name of the trust, tax ID number, name of trustee(s) and date of the trust. Please provide copies of the Trust that include the trust name, date of trust, the trustee(s), successor trustees and the signature page. If the trustees are the same as the current Ford Interest Advantage owners, only an authorizing signature of the current Ford Interest Advantage owners is required to change the registration to a trust ownership on page 2. If the trustees

are not the current Ford Interest Advantage owners or if a current Ford Interest Advantage owner is being removed, the signature(s) of **ALL CURRENT FORD INTEREST ADVANTAGE OWNERS** must be guaranteed by a financial institution on page 2. The owner(s) to be removed must also complete the Ownership Change section. For additional trustees, please supply the same information as requested below. **NO P.O. BOX WILL BE ACCEPTED.**

Please be sure to provide your signature on page 2.

Ford Interest Advantage Ownership Change Requirements Guide

INVESTORS: Please contact Investor Services at 1-800-462-2614, Monday-Friday 8:30 AM-7:00 PM ET to request assistance and instructions. The attached matrix is intended to provide guidance when gathering the necessary documents and signatures for an ownership change to your Ford Interest Advantage.

	Ownership Type	Change Form Required	Signatures Required	Patriot Act Information (1)	Medallion Signature Guarantee Stamp (2)	Letter of Instruction (3)	Death Certificate (Original or Certified Copy)	Marriage/ Divorce Certificate Or other Court Document	Letters Testamentary or Other Court Document (4)	Trust Agreement	W-9 Form www.irs.gov
Individual Ownership Change	Add Owner(s)	Yes	Yes, Current Owner and Additional Owner(s)	Yes	Yes, Current Owner	-	-	-	-	-	-
	Name Change of Owner	Yes	Yes, Old and New Signatures	-	-	Yes	-	Yes	-	-	-
Joint Ownership Change	Add Individual Owner(s)	Yes	Yes, Current Owners	Yes	Yes, Current Owner	-	-	-	-	-	-
	Remove Secondary Owner(s)	Yes	Yes, Current Owners	-	Yes, All Owners	-	-	-	-	-	-
	Name Change of Owner(s)	Yes	Yes, Old and New Signatures	-	-	-	-	Yes	-	-	-
	Remove Name of Deceased Owner (Primary Owner)	Yes	Yes, All Remaining Owners	-	Yes	Yes	Yes	-	Yes	-	Complete W-9 for New Primary Owner
	Remove Name of Deceased Owner [Secondary Owner(s)]	Yes	Yes, All Remaining Owners	-	-	Yes	Yes	-	-	-	-
Custodial Change	Change Custodian (when Custodian is resigning)	Yes, from resigning Custodian	Resigning Custodian and New Custodian	Yes	Current and Resigning Custodian	-	-	-	Yes if originally court appointed.	-	-
	Change Custodian (due to death of Custodian)	Yes	New Custodian	Yes	New Custodian	-	Yes	-	Yes	-	-
	Change to Individual Ownership from UGMA (minor reached age of majority)	Yes, from Minor	Custodian and Minor	Yes	Custodian and Minor	Custodian and Minor	-	Birth Certificate or current Driver's License	-	-	-
	Change to the Estate of the Deceased Minor	Yes	Custodian	Yes	Custodian	Custodian	Yes	-	Yes	-	-
Trust Ownership Change	Add Owner to Trust (Amended Trust)	Yes	Current and New Trustee(s)	Yes	Existing Trustee	-	-	-	-	First three and last three pages of trust agreement reflecting new Trustee(s) and any Successor Trustee(s).	-
	Remove a Trustee from a Trust	Yes	Current Trustees	-	Current Trustees and Trustee(s) being removed.	-	Yes, if Trustee being removed is deceased.	-	-	-	-
	Change to Trust Ownership from Individual or Joint Ownership	Yes	Current Owners	Yes	No, if no change in current owners; Yes, if change in owners.	-	Yes, if owner is deceased	-	-	First three and last three pages of trust agreement reflecting new Trustee(s) and any Successor Trustee(s).	Yes

Documentation Definitions:

- (1) Patriot Act Information: See Page 3 of the Change Form for full details.
- (2) Medallion Signature Guarantee Stamp from a financial institution verifying your signature.
- (3) Letter of Instruction: Letter containing note holder's name, note number and written request of specified changes to make to change the ownership type of the note.
- (4) Letters of Testamentary: Certified court issued documents indicating legal executorship. Small Claims Affidavit: Document issued when the total assets fall under the dollar limit set by state statutes.