



New Hampshire
COMMUNITY
LOAN FUND

Investment Advisor / Fiduciary Update

Investment Number(s): _____

I would like to:

- ☐ Add Investment Advisor
- ☐ Remove Investment Advisor
- ☐ Change Investment Advisor

Name of Current Advisor/Fiduciary (if applicable):

Company/Firm:

Current Advisor's Phone/Email:

Current Advisor Address: _____

City, State: _____ *Zip Code:* _____

Name of New Advisor/Fiduciary (if applicable):

Company/Firm (if applicable):

New Advisor's Phone/Email:

Advisor Address: _____



New Hampshire
COMMUNITY
LOAN FUND

City, State: _____ Zip Code: _____

Notes:

[Please add any other details we should include in your investment records]

☐ (If applicable) I give New Hampshire Community Loan Fund authorization to discuss the terms of my investment agreement with the aforementioned advisor.

Printed Name: _____

Signature Date

Printed Name: _____

Signature Date