Please remember to sign application after printing.

Print | Clear Form

Financial Advisor Change Form

Use this form to change the financial advisor information on your Invesco account.

PLEASE USE BLUE OR BLACK INK **PLEASE PRINT CLEARLY IN BLOCK CAPITAL LETTERS**

Start Here > Use "Tab" key to move to next field.

1 | Registration Information and Invesco Account Number

☐ SSN or ☐ TIN *(Required)*

Invesco Account Number or Plan ID

Account Registration *(Please print name(s) as it appears on account.)*

Primary Phone Number

Alternate Phone Number

2 | New Financial Advisor Information *(Please contact your financial advisor for assistance in completing this section.)*

Name of Firm *(Required)*

Invesco Dealer Number *(if known)*

Financial Advisor's Name *(Required)*

Financial Advisor's Number *(Required)*

Branch Number *(Required)*

Branch Address

City

State

ZIP

Financial Advisor's Phone Number

Branch Phone Number

3 | Authorization and Signature *(Please sign and date below.)*

Account Owner's Signature *(Required)* Title Date (mm/dd/yyyy)

X

Account Owner's Signature Title Date (mm/dd/yyyy)

X

(If more than one shareowner on account.)

4 | Mailing Instructions

Please send completed and signed form to one of the addresses detailed below OR fax to 713 986 9766.

(Direct Mail)
Invesco Investment Services, Inc.
P.O. Box 219078
Kansas City, MO 64121-9078

(Overnight Mail)
Invesco Investment Services, Inc.
c/o DST Systems, Inc.
430 W. 7th Street
Kansas City, MO 64105-1407

For assistance please contact an Invesco Client Services representative at 800-959-4246, weekdays, 7 a.m. to 6 p.m. Central Time.

Visit our website at invesco.com/us

- Check your account balance
- Check transaction history
- View account statements and tax forms
- Sign up for eDelivery of statements, daily transaction statements, tax forms, prospectuses and reports
- Check the current fund price, yield and total return on any fund
- Process transactions
- Retrieve account forms and investor education materials

Call the 24-Hour Automated Investor Line 800 246 5463 to:

- Obtain fund prices
- Check transaction history
- Order account statement(s)
- Check your account balance
- Process transactions

To use the system, please have your account numbers and Social Security number available.