



Talent – Residual Setup Change Request

Please return the completed and signed form to EP Residuals Adjustments:

- Email: Residuals_Adjustments@ep.com

Please indicate type of change:

- | | |
|----------------------------------------------------------|------------------------------------------------------------|
| <input type="checkbox"/> Individual to Loan-Out | <input type="checkbox"/> Dissolved Loan-Out to Individual* |
| <input type="checkbox"/> Individual to Beneficiary | <input type="checkbox"/> Loan-Out to New Loan-Out |
| <input type="checkbox"/> Beneficiary to New Beneficiary* | <input type="checkbox"/> Other |

*Attach proof of New Beneficiary; Death Certificate, Will & testament. For Estates letters of testamentary or letters of administration.

*Attach proof of “**Dissolved**” Loan-Out Corporation from the State where the Loan-Out was incorporated under.

CHANGE SET UP FROM:

First Name: _____ Last Name: _____

Phone: _____ Last 4 of SSN: _____

Old Loan Out Company Name: _____ Loan Out Tax ID: _____

First Beneficiary Name: _____ Last 4 of SSN: _____

CHANGE SET UP TO:

First Name: _____ Last Name: _____

Phone: _____ Last 4 of SSN: _____

New Loan Out Company Name: _____ Loan Out Tax ID: _____

New Beneficiary Name: _____ Last 4 of SSN: _____

Email: _____

Documents you are attaching with this form:

Employee/Manager Signature: _____ Date: _____

PLEASE NOTE: We do not accept electronic signatures (e.g., DocuSign, SignNow, eSign). We will accept a scan or photo of your wet signature along with your request.