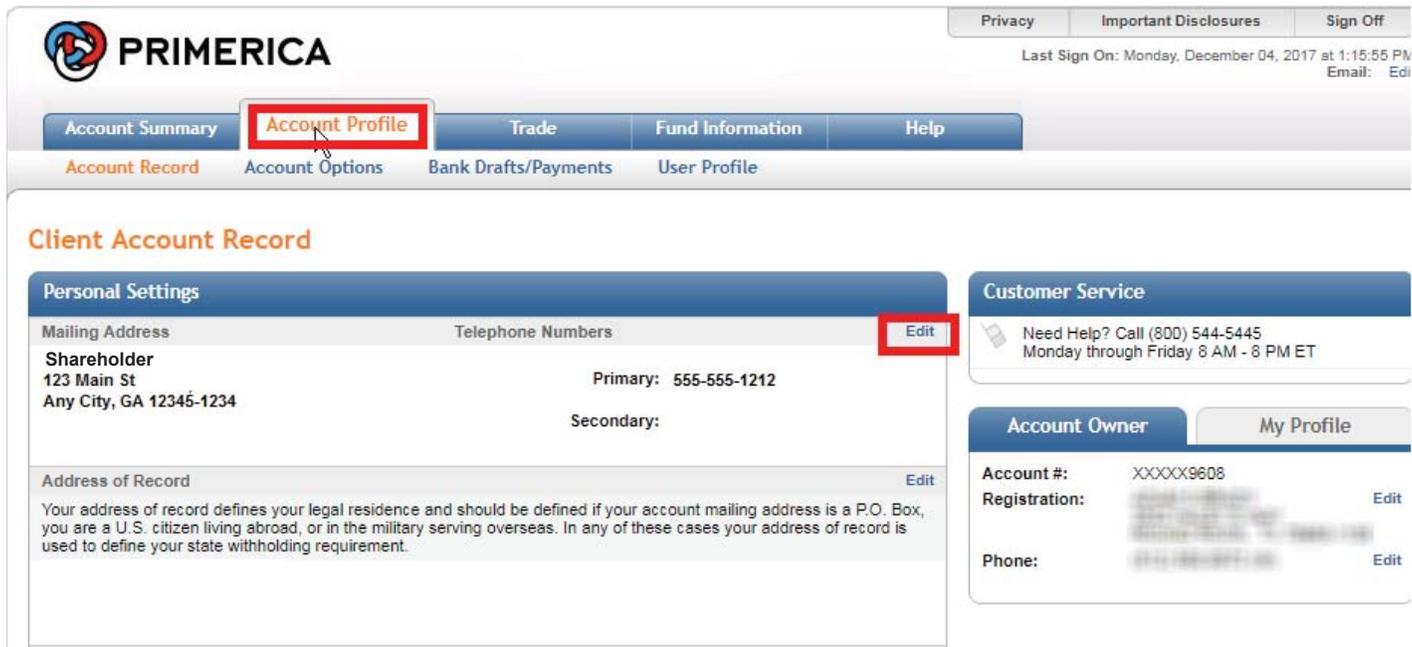


How to change your mailing address on Shareholder Account Manager (SAM)

To view and/or change your mailing address and/or your physical address online, please complete the following steps:

1. Sign on to [Primerica Shareholder Services](#).
2. If you have multiple accounts, click on the desired account number from your Account List; if you have a single account, the system will open on the 'Account Summary' page for your account go to the next step.
3. Click on the 'Account Profile' link to the right of 'Account Summary', it will default to the 'Account Record' page.
4. Click 'Edit' to the right of the current address and phone number on record.



PRIMERICA

Privacy | Important Disclosures | Sign Off
Last Sign On: Monday, December 04, 2017 at 1:15:55 PM
Email: Edi

Account Summary | **Account Profile** | Trade | Fund Information | Help

Account Record | Account Options | Bank Drafts/Payments | User Profile

Client Account Record

Personal Settings

Mailing Address	Telephone Numbers	Edit
Shareholder 123 Main St Any City, GA 12345-1234	Primary: 555-555-1212 Secondary:	

Address of Record Edit
Your address of record defines your legal residence and should be defined if your account mailing address is a P.O. Box, you are a U.S. citizen living abroad, or in the military serving overseas. In any of these cases your address of record is used to define your state withholding requirement.

Customer Service
Need Help? Call (800) 544-5445
Monday through Friday 8 AM - 8 PM ET

Account Owner | My Profile

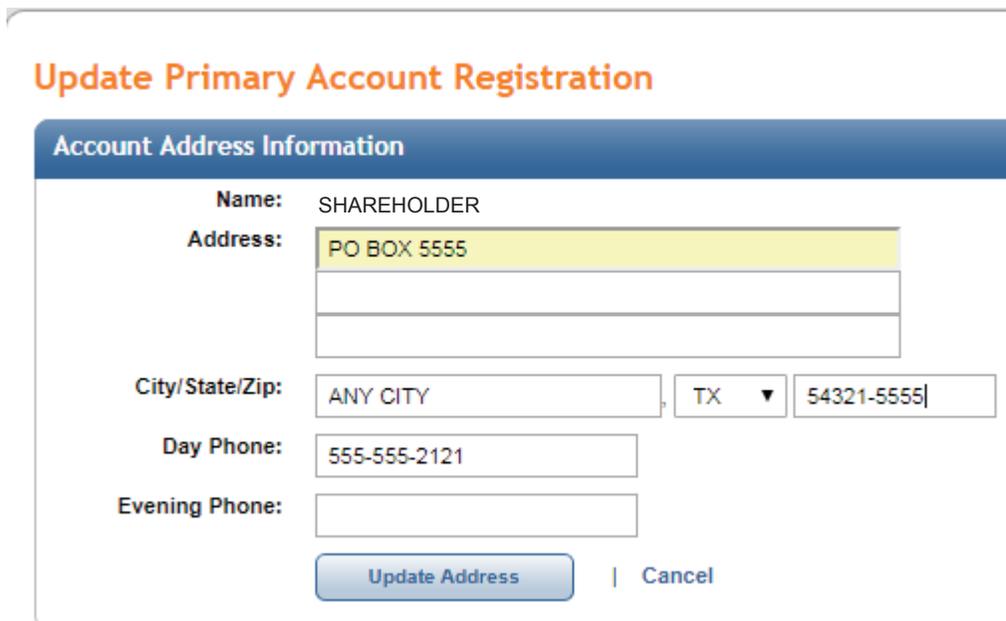
Account #: XXXXX9608
Registration: [Redacted] Edit
Phone: [Redacted] Edit

The 'Update Primary Account Registration' page will open and allow you to enter your new address and phone number(s).

If your mail is sent to your home then update just the mailing address. If your mailing address is not your home address, for example you have a PO (Post Office) Box or you are a U.S citizen living aboard or in the military serving overseas, then after changing your mailing address you will also need to update the 'Address of Record' with your physical address.

In this example the owner has moved and is now using a PO Box to receive mail.

First click "Update Address"



Update Primary Account Registration

Account Address Information

Name: SHAREHOLDER

Address: PO BOX 5555

City/State/Zip: ANY CITY, TX, 54321-5555

Day Phone: 555-555-2121

Evening Phone:

Update Address | Cancel

Now the address is reviewed. If anything was not entered correctly, click on “**Previous**” to make any changes. If the change is correct, click on “**Confirm Changes**” to save the update.

Update Address

Account Address Information

Your requested changes are not saved until confirmed. Please review your changes and, if correct, press Confirm Changes to save your updates. Otherwise, press Modify Address to make additional changes.

Name: SHAREHOLDER
Address: PO BOX 5555
City/State/Zip: ANY CITY, TX 54321-5555
Day Phone: 555-555-2121
Evening Phone:

[Confirm Changes](#) | [Previous](#) | [Cancel](#)

You will now return to the “**Client Account Record**” with a message that the record has been updated.

If this was a physical address the address change would be complete. In this case since a PO Box is being used the ‘**Address of Record**’ should also be updated with a residential address. This applies any time you are living somewhere else other than the address where your mail is being sent, such as on a military base overseas or a US Citizen living abroad.

Click ‘**Edit**’ next to ‘Address of Record’

Client Account Record

 Your account record has been updated as requested.

Personal Settings

Mailing Address	Telephone Numbers	Edit
SHAREHOLDER PO BOX 5555 ANY CITY, TX 54321-5555	Primary: (555) 555-2121 Secondary:	
Address of Record		Edit

Your address of record defines your legal residence and should be defined if your account mailing address is a P.O. Box, you are a U.S. citizen living abroad, or in the military serving overseas. In any of these cases your address of record is used to define your state withholding requirement.

123 MAIN ST
ANY CITY, GA 12345-1234

Enter the new physical address and click on “**Update Address of Record**” to continue

Modify Address

Address of Record Information

The address of record is the street address of the shareholder's residence. P.O. Boxes and Suite addresses are not acceptable for address of record.

Name:

Address:

City, State Zip:

[Update Address](#) [Cancel Update](#)

Again the address is reviewed and if anything was not entered correctly, click on **“Modify Address”** to make any changes. If the address is correct, click **“Confirm Changes”** to save the change.

Update Address

Address of Record Information

The address of record is the street address of the shareholder's residence. P.O. Boxes and Suite addresses are not acceptable for address of record.

Your requested changes are not saved until confirmed. Please review your changes and, if correct, press Confirm Changes to save your updates. Otherwise, press Modify Address to make additional changes.

Name: SHAREHOLDER
Address: 212 MAIN ST
City, State Zip: AUSTIN, TX 78681

This returns you to the **‘Client Account Record’** with a message **‘Your account has been updated as requested.’** It now shows your correct mailing and physical address.

Client Account Record

 Your account record has been updated as requested.

Personal Settings

Mailing Address	Telephone Numbers	Edit
SHAREHOLDER PO BOX 5555 ANY CITY, TX 54321-5555	Primary: (555) 555-2121 Secondary:	
Address of Record		Edit
Your address of record defines your legal residence and should be defined if your account mailing address is a P.O. Box, you are a U.S. citizen living abroad, or in the military serving overseas. In any of these cases your address of record is used to define your state withholding requirement.		
SHAREHOLDER 212 MAIN ST AUSTIN, TX 78681		

That's it you're done!