

# (Firm Letterhead)

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[DATE]

DTCC Solutions LLC  
Account Administration Department  
18301 Bermuda Green Drive  
Tampa, FL 33647

via: email to [DTCCSolutionsAA@DTCC.COM](mailto:DTCCSolutionsAA@DTCC.COM)  
& mail **original** to address above

Effective on [Future Date], the undersigned is requesting that cost basis information, in the form of CBRS records, for our CBRS account(s) as identified through any of the numbers noted below, be sent to our CBRS account.

Account ID Requesting Change For (provide one to allow us to identify your CBRS account):

CBRS account #: [ ]  
NSCC Member #: [ ]  
DTC Participant #: [ ]  
Transfer Agent #: [ ]

As a result, we hereby request that you create an 'Inactive record' in your master files to include the following Alternative Identifier(s) under our CBRS account:

Alternative ID Changes Requested:

OCC Number (8 digits): [#####]  
FED Number (ABA/9 digits): [#####]  
FED Short Name (telegraph name): [limited to 18 characters]

Any questions associated with this request should be directed to [Firm contact information].

Sincerely,  
[Legal Entity Name for CBRS account]

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(Authorized CBRS User Signer)

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(Print Name/Title)