

TreasuryDirect® Offline Transaction Request



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Use this form to request TreasuryDirect account transactions that cannot be completed online. If a . . .

- *Decedent's estate is involved, see the instructions for examples of when this form may or may not be used.*
- *Change to an Entity Account or Entity Account Manager is involved, see the instructions for additional evidence that may be required.*

Carefully read all of the instructions before completing this form and complete only the parts of the form that apply to the transaction(s) requested. Parts A and E must be completed for ALL transactions

At a glance...

If you are the . . .	and are requesting . . .	then complete parts	and also provide this evidence:
Account owner or parent of a minor account owner	Change or correct account name Correct Social Security Number Correct date of birth	A, C, and E	None required.
Account owner or parent of a minor account owner and the security is a restricted, converted security	Edit registration	A, B, and E	If the non-converting coowner or beneficiary is deceased, a certified copy of his or her death certificate.
Non-converting coowner or beneficiary	Edit registration	A, B, and E	None required.
Attorney-in-fact	Edit registration	A, B, and E	A copy of the power of attorney document, containing the grantor's signature and witnessed or certified in accordance with applicable state law.
	Change or correct account name Correct Social Security Number Correct date of birth	A, C, and E	
Entity Account Manager or new Entity Account Manager	Change or Correct Entity Account Information	A, D-1, and E	A copy of the trust, corporate resolution, letters of appointment, death certificate, etc. as applicable. See instructions.
	Change or correct Entity Account Manager information	A, D-3, and E	
	Change or correct Entity Account Manager	A, D-4, and E	
Currently acting Entity Account Manager	Change Entity Account Manager	A, D-2, and E	Copy of trust, corporate resolution, letters of appointment, death certificate, etc., as applicable. See instructions.

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Jicheng Xie



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