



3003 32nd Ave S, Suite 250, Fargo, ND 58103
Phone (701) 239-6879

ACCOUNT INFORMATION

Effective Date: _____ Current Registration Name: _____

Current Account Number: _____ Telephone Number: _____

Email Address: _____

Current Address: _____

City: _____ State: _____ Zip: _____

☐ Class A ☐ Class B ☐ Class I ☐ UPREIT Unit Holder

SELECT TYPE OF CHANGE(S)

☐ Change of Permanent Address:

Street: _____

City: _____ State: _____ ZIP: _____

This is a Permanent Address Change and changes my/our State of Residency to: _____ (state)

☐ Seasonal Address:

Start Date: _____ End Date: _____

Street: _____

City: _____ State: _____ ZIP: _____

☐ Registration Name Change:

New Registration Name: _____

- ☐ Marriage: Attach a copy of the marriage certificate
- ☐ Death: Attach a certified death certificate
- ☐ Divorce: Attach a copy of the divorce decree
- ☐ Other: Attach a copy of the relevant court documentation

☐ Tax ID Change:

Current Taxpayer Identification Number: _____

New Taxpayer Identification Number: _____ (complete w-9)

Office Use Only

☐ CU ☐ MIMIC ☐ IM ☐ Letter NOTES:

Account Change Form

☐ Type of Account Change:

- ☐ Broker ☐ IRA (type) _____ ☐ Profit Sharing Plan ☐ Corporation (attach resolution)
☐ Joint Account ☐ Tenancy in Common ☐ Custodianship ☐ Joint Tenancy – Right of Survivorship
☐ Trust (type) _____ ☐ Individual ☐ Partnership (attach partnership agreement)
☐ 401 (K) Retirement Plan ☐ Other: _____

☐ Change Distribution Election: *Please contact our office at 701-239-6879 to find out if your state can participate in the Distribution Reinvestment Plan.*

- ☐ Distribution Reinvestment Plan (DRIP) ☐ Cash Dividend

☐ Change Cash Dividend from Check to Direct Deposit

- ☐ Deposit into Checking Account ☐ Deposit into Savings Account

ATTACH HERE:
Required to attach a voided check or savings slip.

Please do not attach a deposit slip.

REQUIRED SIGNATURE(S)

Signature(s) – Required to process changes. If a joint account is held with Dakota REIT, each joint owner is required to sign. When signing is by attorney, administrator, executor, guardian, trustee, officer of corporation or other person acting in a fiduciary or representative capacity, please set for the full title in such capacity below and enclose proper evidence of authority.

Signature(s) of Shareholder or Title

Date

Signature(s) of Shareholder or Title

Date

Return the completed form by email to invest@dakotareit.com or by mail to:

The Dakota REIT
3003 32nd Ave. S, Suite 250
Fargo, ND 58103

If you have any questions while completing this Form, please call 701-239-6879.