

## Name Change Kit

### Step 1: **REQUEST A CERTIFIED COPY OF YOUR MARRIAGE LICENSE**

- After the officiant has returned your marriage license to the courthouse and it has been registered with the state recorder you will then receive ONE FREE certified copy of your marriage license. However, it is suggested that **you order at least one other certified copy** so that you won't have to wait for the return of one to make another name change somewhere else. The best time to order additional copies is with the actual return of the original marriage license. Additional copies **only cost \$2.00 each** when sent in with the marriage license. (They will cost considerably more at any time thereafter) Most countries will only accept 'money orders' and should be filled out to 'clerk of the courts'.

### Step 2: **CHANGE YOUR DRIVER'S LICENSE & SOCIAL SECURITY RECORDS FIRST\***

- To change your **driver's license record**, you must go to your local Dept. of Motor Vehicles or DMV (where you got your driver's license). You can find your local DMV office in the blue pages of the phone book under "State Government offices" (If your state DMV takes appointments, it is suggested that you call to schedule an appointment) Take your current driver's license and a certified copy of your marriage license. Your copy of the marriage license will be given back immediately.

Note: While at the DMV, you can also take care of **voter registration**.

- To change your **social security record**; complete Form SS-5 (this must be filled out in **blue** or **black** ink). You can do this in person at any Social Security office or by mail. You can find your local office in the blue pages of your phone book under "United States Government Offices". There is no cost for changing your social security records (if some company contacts you & wants to charge you to do this, know that they are not with the SSA & should be reported). You can use the enclosed Form SS-5 or go to: <http://www.ssa.gov/online/ss-5.pdf> or call the Social Security Administration at 1-800-772-1213.

If you choose to mail in your form you can expect to get your marriage license mailed back within 7-10 days. Your new Social Security Card will take about 2-4 weeks.

Note: You may leave items 5, 8B and 9B blank.

Note: The IRS is also linked to the Social Security Administration and does not need formal notification providing you make the name change through the Social Security Administration. Your name change will update automatically with the IRS.

### **Step 3: CHANGE ALL YOUR OTHER RECORDS**

- **Internal Revenue Service** – You do not have to immediately notify the IRS of a name change (they get it from Social Security). However, you do notify the IRS of an address change on Form 8822, & on line 5 you can indicate your name change. If your address is not changing, when you do your taxes next time, use your new name. The IRS looks for a match with Social Security. You can get Form 8822 at: <http://www.irs.gov>

- **U. S. Post Office** – You do not need to inform the post office of your new name, but if you've moved, you'll want mail now going to your old address forwarded to your new home. Go to <http://www.usps.gov>. This can be done online by clicking on the "Change Address" link at the top, or visit your local post office for a change of address form. The post office will forward mail up to a year, and it can take up to six weeks to get it.

- **U. S. Passport** – If your passport is current, you change your name by completing Amendment Form DS-19. Read the instructions carefully. There is no fee for this service, unless you request your documents to be expedited. The cost for this service is \$60.

*Notice!* If you are planning a trip right after your wedding, travel under your maiden name. Passport name, ticket name, and all travel documents much match.

Get Form DS-19 at: <http://travel.state.gov/DS-0019.pdf>

Mail your completed amendment form, old passport, and certified copy of your marriage license to:

**Charleston Passport Center  
1269 Holland Street  
Charleston. SC 29405**

Note: The forms you print must be clear and sharp. Applications that are blurred or illegible will not be accepted. They must be printed in black print on white regular paper. Thermal paper, dye-sublimation paper, special inkjet paper, and other shiny papers are not acceptable.

Your documents will be returned and there is no fee for this service.

## ***NAME CHANGE CHECKLIST***

**Use this checklist to keep track of records you have changed concerning your new name.**

### **Banking & Financial Records**

- All Checking and all Savings Accounts
- Investment Accounts (i.e. mutual funds, stock brokerage)
- Retirement Accounts (i.e. 401K, IRA, Deferred Compensation)
- All Vehicle Loans or Lease Companies
- All Credit Cards
- All Department Store Accounts
- Reward Programs (i.e. frequent flyer or frequent stay programs)

### **Government Agencies**

- Social Security Card – The Social Security Department will automatically forward your name change to the IRS and your State Department of franchise (For your state taxes if applicable). It is not necessary to contact these two agencies.
- Department of Motor Vehicles – Change your Driver's license, vehicle title registration and state identification card if applicable
- Voter Registration – Can be changed at most DMV locations when you change your license
- Change your current Passport records – if applicable through the United States Passport Agency

### **Household Records**

- Change of Address with Post Office
- Mortgage Company or Landlord
- Homeowner Associations, Association Dues, any other Management Company
- All Utility companies – power, gas, water, garbage, phone, cable, internet

- Pager and/or Cell Phone company
- Property Tax
- Title Records
- Auto Insurance
- Homeowners Insurance
- Health Insurance
- Life Insurance/Disability Insurance
- Household Security Companies
- Magazine Subscription
- Newspaper Subscription

## **Personal Records**

- Medical records – Family doctor, dentist, pharmacist and veterinarian
- Accountant, Lawyer, Insurance Agent, Financial Planner, etc.
- Your Company's Human Resource Department

## **Memberships and Organizations**

- Health Clubs, Country Clubs, and any other social organizations
- Professional Membership Organization
- Charity Organization
- Church
- Alumni Organizations
- Library

Congratulations! Now you can get on with your married life

**NOTICE OF NAME AND ADDRESS CHANGE**  
**(For accounts shared prior to marriage)**

Dear \_\_\_\_\_,

We would like to inform you of our recent marriage and address change. Our account number is \_\_\_\_\_.

Husband's Full Name:

\_\_\_\_\_

Bride's Full Maiden Name:

\_\_\_\_\_

Husband's Former Address:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Bride's Former Address:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Are Now:**

\_\_\_\_\_

Husband's Full Name

\_\_\_\_\_

Wife's Full Name

\_\_\_\_\_

New Address

\_\_\_\_\_

City

State

Zip

Date of Marriage: \_\_\_\_\_

Special Instructions:

(check appropriate sections)

\_\_\_\_\_

We plan to continue service

\_\_\_\_\_

We plan to discontinue service after \_\_\_\_\_

\_\_\_\_\_

Please send necessary forms to include my spouse on my policy/account

If you have any questions, please feel free to contact us at: ( ) \_\_\_\_\_

Sincerely,

\_\_\_\_\_

Husband's Name

\_\_\_\_\_

Husband's Signature

\_\_\_\_\_

Wife's Name

\_\_\_\_\_

Wife's Signature

## ***NAME CHANGE REQUEST FORM***

To Whom It May Concern:

I have recently married and need to have my records changed to reflect my new name.

My name currently on record: \_\_\_\_\_

My account/plan number is: \_\_\_\_\_

Please change my name on record to the following:

\_\_\_\_\_

My address is the same \_\_\_\_\_ / has changed \_\_\_\_\_ from your current records to:

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Copies of my driver's license and marriage certificate are enclosed. If you need additional information, please do not hesitate to contact me at:

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Thank you in advance for your attention to this matter.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date