



To update directly through DriveWealth's secure portal

1. Go to [DriveWealth's Client Portal](#) to review your tax certification and registration information
 - a. Find your DriveWealth account number on the upper-left corner of your monthly statement (available on your Invest dashboard in the Greenlight app)
 - b. Only input the last 10 characters of the account number detailed on the monthly statement (e.g. DWDWXXXXXX not DWDW-XXX-DWDWXXXXXX)
 - c. Don't know your account number? Find it [here](#).
2. If you need to make an update to your W9 (see chart below), update your records to reflect your correct name and/or TIN following the steps below:
 - a. Log in with your Account ID, last 4 digits of your SSN, and date of birth
 - b. You will receive a one time password on your phone or email depending on your set preference
 - c. Once logged in, select **User information** on the landing page or on the navigation pane to the left
 - d. On the **User information** page, select **Edit** on the top right to update your name and/or TIN
 - e. Verify the information is correct, check confirmation boxes, and select **Submit** to agree to the changes

How to determine what needs to be updated:

IF	THEN
1. The last name and SSN on your account agree with the last name and SSN on your social security card	1. Contact your local SSA office to ascertain whether the information on SSA's records is different from that on your social security card, and to resolve any problem. Also, put your name and SSN on the Form W-9 following the instructions on the form.
2. The SSN on your account is different from the SSN on your social security card, but the last name is the same	2. Put your name and SSN, as shown on your social security card, on the Form W-9, following the instructions on the form. You do not need to contact SSA.
3. The last name on your account is different from the last name on your social security card, but the SSN is the same on both	3. Take one of the following steps (but not both): (a) If the last name on your account is correct, contact SSA to correct the name on your social security card. Put your name and SSN, as shown on your social security card, on the Form W-9, following the instructions on the form. However, if you are not able to contact SSA at this time, you can provide us with both last names. Put your SSN and the name shown on your social security card plus the last name shown on your account (in that order) on the Form W-9 following the instructions on the form. For example, if your social security card lists your maiden name, give us your SSN and your name in the following order: First/ maiden/married name. Please note, however, that you should contact SSA as soon as possible so they can correct their records. (b) If the last name on your social security card is correct, put that name and your SSN on the Form W-9 following the instructions on the form. You do not need to contact SSA.
4. Both the last name and SSN on your account are different from the last name and SSN on your social security card	4. (a) If the last name and SSN on your social security card are correct, put that name and SSN on the Form W-9 following the instructions on the form. You do not need to contact SSA. (b) If the last name on your account and the SSN on your social security card are correct, follow the procedure in section 3(a) above. Be sure to put the name shown on your account and the name on your social security card on the Form W-9.



If you are required to visit an SSA office, take this notice, your social security card, and any other related documents with you. Information regarding what documentation is needed to update information with the Social Security Administration is available at ssa.gov.

As always, we're here to help. Please reach out to our customer service team 24/7 at 888-483-2645 with any questions, or [submit an inquiry](#) to DriveWealth.

Thank you,
The Greenlight Team