

# College Savings Plan Name Change Authorization

Complete this form to update all of your college savings plan accounts if your name has changed due to marriage, divorce, or other reasons. This form may also be completed to update the name of a beneficiary, or a minor on a UGMA/UTMA account. If you have questions, call **1-800-222-8222**.

## 1 NAME AND MAILING ADDRESS (PLEASE PRINT)

Name of account owner or custodian as currently registered (first, middle initial, last)		Social Security/taxpayer ID number	
U.S. residential street address	City	State	Zip code
U.S. mailing address (if different than U.S. residential street address)	City	State	Zip code
Daytime phone	Evening phone		

**Note:** If the address above is different than the address currently listed on our records, we will update all accounts for the account owner or custodian. All future correspondence will be sent to the new address until you advise us otherwise. The beneficiary's or minor's address, if provided in section 3 of this form, will be updated on all accounts for which the same account owner or custodian are authorized. **Distributions to a new address will require your signature to be Medallion Guaranteed if requested within 15 days of the address being changed.**

## 2 COMPLETE FOR AN ACCOUNT OWNER OR CUSTODIAN NAME CHANGE

If the account owner or custodian has had a legal name change, please provide the new name below. All college savings plan accounts for the account owner or custodian will be updated.

\_\_\_\_\_  
New name for account owner or custodian (first, middle initial, last)

## 3 COMPLETE FOR A BENEFICIARY OR MINOR NAME CHANGE

If the beneficiary or minor has had a legal name change, please provide the information below. All college savings plan accounts for which the same account owner or custodian are authorized will be updated.

Former name of designated beneficiary or minor (first, middle initial, last)		Social Security/taxpayer ID number	
New name of designated beneficiary or minor (first, middle initial, last)			
Street address	City	State	Zip code

To complete your request for name change, section 5 of this form must also be completed

**4 EXISTING ACCOUNT OPTIONS**

To update the bank information for existing account options, include a preprinted voided check for checking or a deposit slip for savings. If you would like to establish new options on your account(s), a completed Account Change Request form is required.

**If you include bank information, your existing Automatic Investment Plan (AIP), redemption, and Express Purchase options will be updated. If you do not want these options updated, check the boxes below:**

- I do **not** want the bank information for my AIP option updated.
- I do **not** want the bank information for my redemption option updated.
- I do **not** want the bank information for my Express Purchase option updated.

**Account type:**  Checking (attach a voided check)  Savings (attach a voided deposit slip)

**Note:** If no box is checked, your account will be updated as checking.

\_\_\_\_\_  
Name of bank

\_\_\_\_\_  
ABA/routing number for ACH

\_\_\_\_\_  
Bank account registration

\_\_\_\_\_  
Bank account number

**5 SIGNATURE(S) AND MEDALLION GUARANTEE**

A Medallion Guarantee is required:

- When the name change is for the account owner or custodian; signatures in the former and new name are required.
- For the custodian if the account is registered as a UGMA/UTMA account and the name change is for the minor.

**X** \_\_\_\_\_  
Signature in **former** name for account owner or custodian (or signature of account owner or custodian for a beneficiary or minor name change)

**X** \_\_\_\_\_  
Signature in **new** name (for an account owner or custodian name change only)

\_\_\_\_\_  
Date

**Medallion Guarantee\***

*\*A **Medallion Guarantee** may be obtained from any eligible guarantor institution, as defined by the Securities and Exchange Commission. These institutions include banks, savings associations, credit unions, and brokerage firms that participate in the Medallion Program. The bar-coded stamp with the words "**MEDALLION GUARANTEED**" must be stamped near the signatures being guaranteed. The guarantee must appear with the name of the guarantor institution and the signature of an individual authorized on behalf of the guarantor institution. **Note that a Notary Public stamp or seal is not acceptable.***

- Before you mail, have you:**
- Entered the Social Security/taxpayer ID number in section 1 (and section 3, if applicable)?
  - Had signature(s) **Medallion Guaranteed** in section 5 (if applicable)?
  - Included a voided check to update existing bank information on file (if applicable)?