

2. Updated Account Owner information

- If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your account with **SMART529 Select**.
- If you are changing your name, you must also provide a Notarized Signature in **Section 6**, or provide a certified copy of the appropriate legal documents.
- **Important:** If you are changing your mailing address, there will be a nine (9) business day hold put on your account before you can request a distribution of funds to be sent to the new address. If you want the funds released prior to the waiting period, a Notarized Signature is required at the time of distribution.

Name of Account Owner (first, middle initial, last)

Telephone Number

Email Address

Permanent Street Address (A P.O. Box is **not** acceptable.)

City

State

Zip Code

Account Mailing Address if different from above (This address will be used as the Account's address of record and for all Account mailings.)

City

State

Zip Code

3. Transfer assets to new Account Owner

- This will transfer ownership of all of the assets in the referenced Account to the new Account Owner listed below.
- The new Account Owner will control the Account and the disposition of all assets held in the Account.

Check one.

The new Account Owner does not have an existing Account and has included an **Account Application**.

The new Account Owner has an existing Account.

Account Number (If applicable)

Name of New Account Owner (first, middle initial, last)

Social Security Number or Taxpayer Identification Number (**Required**)

Birth Date/Trust Date (mm/dd/yyyy)

