Bright Start Direct-Sold College Savings Program

Transfer Form



Instructions

- Please read the Bright Start Direct-Sold College Savings Program Plan Description and Participation Agreement before changing the Account Owner and/or Beneficiary on a Plan Account. You may also wish to consult with your financial, legal and/or tax advisor before completing this form.
- If a change of Account Owner or Beneficiary is requested, and the new account does not
 yet exist, the new account may be established online, or by calling the Plan to obtain a
 paper version of the Account Application, to submit along with this Transfer Form.
- A new account number will be assigned to the Account opened for the new Account Owner and/or Beneficiary, unless an Account already exists for that Account Owner/ Beneficiary and the existing number is provided below.
- A Notary is required in **Section 4** for changes of Account Owner for existing accounts. (If using this form to transfer a UTMA/UGMA to a former Minor, a Notary is not required).
- Print in capital letters using blue or black ink, sign and date the form and mail it to the Plan at the above address.

Important: To avoid adverse tax consequences on the Account transfer, the new Beneficiary must be a Member of the Family of the former Beneficiary, as defined in the Bright Start Direct-Sold College Savings Program Plan Description and Participation

1-877-432-7444 Monday to Friday 7 a.m. - 7 p.m. CT

www.BrightStart.com

Regular mailing address:

Bright Start Direct-Sold College Savings Program PO Box 219288 Kansas City, MO 64121-9288

Overnight mailing address:

Bright Start Direct-Sold College Savings Program 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131

Agreement, and as described in Section 529 of the Internal Revenue Code. If the new Beneficiary is not an eligible family member, the change will be considered a Non-Qualified Withdrawal, which means that it may be subject to both state and federal income tax and an additional 10% federal penalty tax on any earnings. A change of Beneficiary is not permissible for custodial accounts opened under the Uniform Gifts to Minors Act (UGMA) or Uniform Transfers to Minors Act (UTMA).

To request assistance in completing this form call us at 1-877-432-7444, Monday to Friday 7 a.m. - 7 p.m. CT.

Change of Account Owner (Same Beneficiary)									
Current Account Informatio	1								
Account Number (Required)		Account Owner Social Security Numb	per (<i>Last four digits Required)</i>						
Account Owner (First name) (Required)									
Account Owner (Last name) (Required)									
Beneficiary (First name) (Required)									
Beneficiary (Last name) (Required)									
Beneficiary Social Security Number or Individual Identification Number (Last four digits Requi		Telephone Number							



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4. SIGNATURE AND AUTHORIZATION (THIS SECTION MUST BE SIGNED FOR THIS CHANGE TO TAKE EFFECT.)

By signing this form, I authorize the transfer of my Account to another Account Owner and/or to change the Beneficiary as indicated on this form. I acknowledge the following:

- I certify that all of the information provided by me on this form is true, complete and correct.
- If changing the Account Owner, the new Account Owner will submit an **Account Application** along with this form, unless he/she already maintains a Plan Account for the Beneficiary and I have provided the existing account number in **Section 2**.
- If changing the Beneficiary, I agree to the same representations, warranties, and agreements for my new Beneficiary as were stated in the original Plan Account Application for my current Beneficiary and I certify that the new Beneficiary is a "member of the family" of the current Beneficiary, as defined in Section 529 of the Internal Revenue Code. I understand that my existing banking information and Successor Account Owner information, if any, will be copied to the new account.
- If I am participating in Recurring Contributions, I understand that my participation in Recurring Contributions will be cancelled only if
 I transfer my entire Account balance to a new Account Owner and/or Beneficiary; otherwise my Recurring Contributions will continue
 in my original Account unless an **Account Features Form** accompanies this form.
- If I am making contributions by payroll direct deposit, I understand that my payroll contributions will continue into this Account, regardless of the amount transferred, unless I notify my employer that I want to stop or change the amount of my payroll direct deposit.
- If I am transferring my entire account balance to another Account Owner, I request the cancellation of my Participation Agreement and the closure of my Account.

If requesting a change of ownership, do not sign below until you are in the presence of the authorized notary providing the notary service.

the authority to act as the Accou	int Owner.
	Date (mm-dd-yyyy)
	OF AN EXISTING ACCOUNT IA/UGMA account where the Beneficiary has
,, State	this document was
by Current Account Owner	who certifies the
	Date (mm-dd-yyyy)
Auth	orized Officer to place stamp here
	TO THE ACCOUNT OWNER t Owner change is related to an UTM State by Current Account Owner



