

Learning Quest Account Owner Change Form



- Use this form to add or replace a Joint Account Owner on your account. To complete this request, all Account Owners, existing and new must sign in **Section 4**. A new Account Application is not necessary.
- Use this form to transfer assets or control of the existing account to a new Account Owner, Responsible Individual or Custodian. To complete the transfer, the new Account Owner/Responsible Individual/Custodian must complete an Account Application if he or she doesn't already have an account established for the beneficiary. If the transfer exceeds \$100,000, you must also provide a signature guarantee in **Section 5**.
- The new Account Owner will control the Account and will become the legal owner of all the assets held in the Account.
- Type in your information and print out the complete form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below. Do not staple.

Return this form and any other required documents to:

Learning Quest
P.O. Box 29202
Shawnee Mission, KS 66201-9202

Or fax this form to: **1-617-559-8901**

Forms can be downloaded from our website at **learningquest.com**, or you can call us to order any form—or request assistance in completing this form—at **1-800-579-2203**.

1. Current Account Information

Account Number

Name of Primary Account Owner/Responsible Individual/Custodian (*first, middle initial, last*) or Entity

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

Telephone Number (*In case we have a question about your Account*)

Name of Designated Beneficiary (*first, middle initial, last*)

Designated Beneficiary Social Security Number



Under penalties of perjury, I certify that:

- 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- 3. I am a U.S. person (including a U.S. resident alien).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

SIGNATURE

Signature of Current Primary Account Owner/Responsible Individual/Custodian

□□ — □□ — □□□□

Date (mm/dd/yyyy)

SIGNATURE

Signature of Current Joint Account Owner (if applicable)

□□ — □□ — □□□□

Date (mm/dd/yyyy)

SIGNATURE

Signature of New Joint Account Owner (if applicable)

□□ — □□ — □□□□

Date (mm/dd/yyyy)

5. Signature Guarantee — IF APPLICABLE

Please sign exactly as your new name will appear on the account. A signature guarantee is a warranty by the guarantor that the signature is genuine and that the person signing is competent and authorized to sign. The signature(s) must correspond in every particular, without alteration, with the name(s) printed on the current account registration. Each signature must be guaranteed by a participant in a Securities Transfer Association Signature Guarantee Program. Many domestic banks, trust companies, credit unions, brokers, dealers, national securities exchanges, registered securities associations, clearing agencies and savings associations participate in such programs. Each guarantee must be an original ink stamp that states "Signature Guaranteed/Medallion Guaranteed" and must be signed on behalf of the guarantor by an authorized person.

Note: Acknowledgement of signature by a notary public is NOT acceptable. Please affix signature guarantee ink stamp below with appropriate signature, title of officer and date.

SIGNATURE

Signature of Current Primary Account Owner/Responsible Individual/Custodian

SIGNATURE

Signature of Current Joint Account Owner (if applicable)

SIGNATURE

Signature of Guarantor

Title

Name of Institution

□□ — □□ — □□□□

Date (mm/dd/yyyy)

Authorized Officer to place stamp here