Learning Quest

Account Maintenance Form



- Use this form to update account information, such as a name or address. If the update involves a name change, please attach a certified copy of the legal documentation to support the change. Use this form to also add, change or remove a Successor Account Owner or Responsible Individual.
- Type in your information and print out the completed 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: Or fax this to: **1-617-559-8901**

Learning Quest P.O. Box 29202 Shawnee Mission, KS 66201-9202 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 Owner information
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	Account Number(s) (To list more than three Accounts, use a separate sheet.)
	Name of Primary Account Owner/Responsible Individual/Custodian (first, middle initial, last) or Entity/Trust
	Name of Joint Account Owner (first, middle initial, last)
	Telephone Number (In case we have a question about your Account.)
2.	Information to update or change
	Individual Account Owner/Responsible Individual/Custodian — Sections 3a and/or 3b
	Entity/Trust Information — Section 3c
	Designated Beneficiary Information—Section 4
	Successor Account Owner/Responsible Individual — Section 5

3. Update Account Owner/Responsible Individual/Custodian information

- If you are changing your contact information or making a legal change to your name, provide the new information exactly as you would like it to appear on your Learning Quest Account.
- If you are changing your name, please attach the certified copy of the legal documentation to support the change or provide a signature guarantee in **Section 7**.

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7. 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 Primary Account Owner/Responsible Individual/Custodian	•
SIGNATURE	
Signature of Joint Account Owner	
SIGNATURE	
Signature of Guarantor	
Title	
	Authorized Officer to place stamp here
Name of Institution	