Achieve Montana Account Information Change Form



- Use this form to change your—or the Joint Account Owner's—name, mailing address, phone number, email address, Successor Account Owner, or interested party information associated with your Achieve Montana Account.
- If you are changing your name, your former signature and your new signature must be guaranteed in **Section 8** by an authorized officer of a bank, broker, or other qualified financial institution.
- If you are changing the Account Owner of an existing Account, your signature must be guaranteed in **Section 8** by an authorized officer of a bank, broker, or other qualified financial institution, and the new Account Owner must include an **Enrollment Form**.
- Please note: If you are changing the Account Owner of an existing account, Joint Account ownership is no longer available. If you choose to change the Account Owner, it will now be an Individual Account.
- 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.

Forms can be downloaded from our website at **www.achievemontana.com**, or you can call us to order any form — or request assistance in completing this form — at **1.877.486.9271** any business day from 7 a.m. to 6 p.m. Mountain time.

	Return this form and any other required documents to:	Phone Number: 1.877.486.9271		
Achieve Montana P.O. Box 219448 Kansas City, MO 64121-9448		Hours: 7a.m. to 6 p.m. Mountain Time Monday through Friday Website: achievemontana.com		
Cur	rent Account Owner information			
Αссоι	Int Number(s) (To list more than three Accounts, use a separate sheet.)			
Name	of Account Owner (first, middle initial, last)			
Name	of Joint Account Owner <i>(If applicable)</i>			
Telepl	hone Number (In case we have a question about your Account.)			
Info	ormation to update or change			
	Account Owner—Section 3A and 4			
	Joint Account Owner—Section 3B			
	Successor Account Owner — Section 5			
	Interested Party—Section 6			



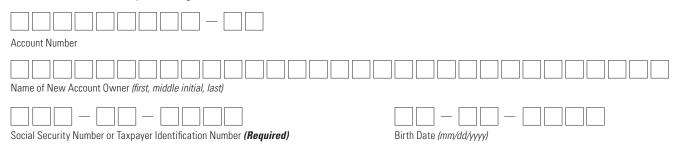
3. Updated Account Owner information

- If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your Achieve Montana Account.
- If you are changing your name, you must also provide a signature guarantee in Section 8.

A. Individual or Entity Account Owner.						
Name of Account Owner or Business Entity/Trust <i>(first, middle initial, last)</i>						
Telephone Number (In case we have a question about your Account.)						
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 will be	ddress of record for all Account mailings.)					
City	State Zip Code					
B. Joint Account Owner (If applicable)						
Name of Joint Account Owner (first, middle initial, last)						
Telephone Number <i>(In case we have a question about your Account.)</i>						
Permanent Street Address (A P.O. box is not acceptable.)						
City	State Zip Code					

4. 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.
- The new Account Owner must also complete an Enrollment Form.
- Joint Account Ownership is no longer available.



5. Successor Account Owner information

- Complete this section only if you are adding, changing, or removing Successor Account Owner information on your Account.
- You may revoke or change the Successor Account Owner at any time. See the Achieve Montana Program Description (Program Description) for more information.
- The person you designate as Successor Account Owner must be at least 18 years old.

Check one.

Add	Change	Delete				
Name of Success	or Account Owner <i>(first, middle ini</i>	tial, last)				
Birth Date (mm/da	d/yyyy) (Required)					

6.

Interested party information

• Complete this section if you want additional persons as an interested party to receive quarterly statements on the Account or if you are replacing or changing interested party information on your Account. To add or change information for more than one interested party, use a separate sheet.

Check one.

Add	Replace interested party	Change current informat	tion Delete				
Name (first, middle initial,							
Address							
City		State	— Zip Code				
Telephone Number (In case we have a question about your Account.)							
Relationship to Act	count Owner	Spouse	Other				

Authorized Officer to place stamp here

Signature — ALL ACCOUNT OWNERS MUST SIGN BELOW (However, if you are changing your name or transferring ownership of your Account(s) to a new Account Owner, skip this section and complete Section 8 instead.)

I/We certify that the information provided herein is true and complete in all respects, and that I/we have read and understand, consent, and agree to all the terms and conditions of the Program Description and understand the rules and regulations governing Achieve Montana.

SIGNATURE	
Signature of Account Owner	Date (mm/dd/yyyy)
SIGNATURE	
Signature of Joint Account Owner (If applicable)	 Date <i>(mm/dd/yyyy)</i>

Signature of Joint Account Owner (If applicable)

Signature Guarantee — REQUIRED FOR NAME CHANGES AND CHANGES TO THE ACCOUNT OWNER OR JOINT ACCOUNT OWNER OF AN EXISTING ACCOUNT ONLY

You must provide the following information as underwritten certification that the new signature is genuine.

 You can obtain a signature guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public cannot provide a signature guarantee, nor can you guarantee your own signature.

• Do not sign below until you are in the presence of the authorized officer providing the signature guarantee.

I/We certify that the information provided herein is true and complete in all respects, and that I/we have read and understand, consent, and agree to all the terms and conditions of the Program Description and understand the rules and regulations governing Achieve Montana.

For name change, sign here

Former Signature of Account Owner/Joint Account Owner (For name change only.)

Current Signature of Account Owner

For transfer of Account ownership, sign here

Signature of Account Owner

Signature of Joint Account Owner (If applicable)

Signature of Guarantor

Title

Name of Institution



