#### Oklahoma 529

## **Profile Change Form**

# Oklahoma529.

- Use this form to change: your name, address, phone number, email address, Successor
  Account Owner/Custodian, Beneficiary Information, Interested Party information or
  Trusted Contact Person information. If you are changing the Account Owner/Custodian or
  Beneficiary of an existing account, you must complete the Transfer Form.
- If you are changing the address on your Account, a hold will be placed on the issuance of any withdrawal until 20 Business Days have passed.
- If you are changing your name you must provide either a legal document such as a copy
  of a Marriage Certificate, court document, or copy of a Social Security card; or have your
  former signature and your new signature Medallion Signature Guaranteed in **Section 8**by an authorized officer of a bank, broker, or other qualified financial institution.
- 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 listed. Do not staple.

To request assistance in completing this form call us at **1.877.654.7284**, Monday through Friday from 7 a.m. -7 p.m. CT.

	1.877.654.7284
10=	<b>1.877.654.7284</b> Monday to Friday 7 a.m. – 7 p.m. C7

www.oklahoma529.com

Regular mailing address: **Oklahoma 529** 

P.O. Box 219249 Kansas City, MO 64121-9249

Overnight mailing address:

Oklahoma 529 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131

Current Account Owner/Custodian Information
assunt Number(s) (To list was then six Assunts use a constant sheet)
ccount Number(s) (To list more than six Accounts, use a separate sheet.).
ccount Owner/Custodian (First name) (M.I.)
ccount Owner/Custodian (Last name)
elephone Number
nformation to Update or Change
Account Owner/Custodian — Section 3
Beneficiary — Section 4
Successor Account Owner/Custodian — Section 5
Interested Party — Section 6
Trusted Contact Person — Section 7

**Email Address** 

#### 3. Updated Account Owner/Custodian Information

• If you are changing your name and/or contact information, provide only the new information exactly as you would like it to appear on your Oklahoma 529 Account.

• If you are changing your name, you must provide a legal document such as a copy of a marriage certificate, court document, or copy

• If you are correcting your social security number, you must provide a copy of a Social Security card or W-9 form.

of a Social Security card.
Account Owner/Custodian (First name) (M.I.
Account Owner/Custodian (Last name)
Permanent Street Address (P.O. boxes are <b>not</b> acceptable.)
City State Zip Code
Account Mailing Address if different from above (This address will be used as the Account's address of record for all Account mailings.)
City.
City State Zip Code
Primary Telephone Number  Secondary Telephone Number
Mobile Landline Landline Landline
I agree to allow Oklahoma 529 and its affiliates, agents, and service providers, to contact me at the phone number(s) provided, or any phone number(s) provided at a later date, using an automatic telephone dialing system or text message, to provide messages, including account matters, informational, and marketing. I acknowledge that providing the phone number(s) is not a condition of receiving any services. By providing the phone number(s), I certify that the phone number is accurate and that I own the rights to use that phone number and to give consent to call or text the phone number(s) provided as well as any phone number(s) provided at a later date.
<b>PLEASE NOTE:</b> If you do not to agree to be contacted for the matters described above, you understand that we may still contact you at the phone number(s) you have provided in order to service your account.
Birth Date (mm-dd-yyyy)

#### DO NOT STAPLE

### 4. Beneficiary Information

• If you are changing your beneficiary name, you must provide a legal document such as a copy of a marriage certificate, court

document, or copy of a Social Security card.	
• If you are correcting your beneficiary social security number, you must provide a copy of a Social Security card or W-9 fo	rm.
If you are changing the Beneficiary, you must submit a new <b>Account Application</b> and a <b>Transfer Form</b> .	
Beneficiary (First name)	(M.I.
Beneficiary (Last name)	
Beneficiary Social Security or Taxpayer Identification Number  Beneficiary Birth Date (mm-dd-yyyy)	
Mailing Address	
City State Zip Code	
Primary Telephone Number  Secondary Telephone Number	
Successor Account Owner/Custodian Information  Note: If your Account is an UTMA/UGMA Account, the individual named in this section will act as Successor Custodian un	til tho
beneficiary has reached the Age of Termination.	tii tiie
• Complete this section only if you are adding, replacing, changing information, or removing Successor information on you The Successor Account Owner/Custodian will become the Account Owner/Custodian upon death of the original Account Custodian.	
• You may revoke or change the Successor Account Owner/Custodian at any time. See the Oklahoma 529 Plan Description information.	ı for more
• The person you designate as Successor Account Owner/Custodian must be at least 18 years old or can be a trust.	
You may only designate one Successor Account Owner/Custodian per beneficiary.	
The Successor Account Owner/Custodian will not receive quarterly statements.	
Check one.	
Add New Replace/Update Existing Delete	
Successor Account Owner/Custodian or Trust (First name)	(M.I.
Supposer Account Outper/Outpeling or Trust // act name)	

Successor Account Owner/Custodian Birth Date/Trust Date (mm-dd-yyyy) (Required)

DO NOT STAPLE

6.	Interested	Partv	Informati	or
•	IIICOI OOCOG	,	·····o·····ac	•

Complete this section if you want to have an additional person (interested party) receive quarterly account statements, to update information about a current interested party, or to replace or remove an interested party. Use a separate sheet if necessary. Check one. Add Replace Change Current Information Remove Interested Party (First name) (M.I.)Interested Party or Trust (Last name) Mailing Address City State Zip Code Telephone Number Relationship to Account Owner/Custodian Compliance Investment Advisor Parent/Guardian Other

#### **Trusted Contact Person Information**

Advisor

Attorney

- By completing this section, you designate the person identified below as your Trusted Contact Person for all beneficiaries, and authorize Oklahoma 529 and its present and future direct and indirect subsidiaries, affiliates, successors and assigns Oklahoma 529 to contact your Trusted Contact Person and disclose information about your Plan account:
  - to address possible financial exploitation;
  - to confirm the specifics of your current contact information, health status, or the identity of any legal guardian, executor, trustee, or holder of a power of attorney; or
  - as otherwise permitted by Financial Industry Regulatory Authority Rule (FINRA) 2165.

Spouse

- This section does not create or give your Trusted Contact Person power of attorney. Your Trusted Contact Person will not be able to access your Account, make changes to your account, or transfer assets to or from your Account.
- Completion of this section is optional and you may withdraw it at any time by notifying the Plan in writing. A Trusted Contact Person must be at least eighteen (18) years of age. You may add, change or remove your Trusted Contact Person by using this form.

Add New	Replace/Update Existing	Remove			
Trusted Contact Person (Fi	rst name)				(M.I.
Trusted Contact Person (La	ast name)				
Trusted Contact Person's F	Primary Telephone Number				
Trusted Contact Person's E	Email Address				
Trusted Contact Person's N	Mailing Address				
City			State	Zip Code	
·	count Owner/Custodian		otato	21p 0000	
Keistingenin to acc	'niint liwnar/i_ligtonian				

Family Member

Friend

Other

### 8. Signature — YOU MUST SIGN BELOW

I hereby make the changes or additions noted above to my Oklahoma 529 Account(s). This information replaces any existing information on file with Oklahoma 529. I certify the information contained herein is true and correct, and supporting documentation is attached if required. If naming a new Successor Account Owner/Custodian, I certify that the Successor Account Owner/Custodian Social Security Number provided is correct, and that the Successor Account Owner/Custodian is a U.S. citizen or resident alien.

SIGNATURE	
Signature of Account Owner/Custodian or Authorized Representative of Entity	Date (mm-dd-vyyy)

# Medallion Signature Guarantee — REQUIRED FOR NAME CHANGES IF LEGAL DOCUMENTATION IS NOT INCLUDED

- You must provide the following information as underwritten certification that your signature is genuine.
- You can obtain a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution.

  A notary public cannot provide a Medallion 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 Medallion Signature Guarantee.
- Please call Oklahoma 529 at **1.877.654.7284** if you have any questions concerning this process.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the Oklahoma 529 Plan Description.

SIGNATURE		
Signature of Account Owner/Custodian (In the presence of the authorized officer.)		
Signature of Guarantor		
Title		
Name of Institution		
Date (mm-dd-yyyy)		

Authorized Officer to place stamp here		

