



Transfer Due to Death of Account Owner Form

Oklahoma529SM

- Use this form to transfer the Account Ownership (or custodianship on an UGMA/UTMA account) due to death.
 - Complete this form for each new Account Owner/Custodian.
 - **Successor Account Owner/Custodian On File:**
The owner/custodian of an individual 529 account is deceased, a Successor Account Owner/Custodian is designated for the account specified, and transfer of ownership is requested by Successor Account Owner/Custodian. Please include death certificate for the deceased Account Owner/Custodian if one is not already on file. **Note:** If your Account is an UTMA/UGMA Account, the Successor Custodian is only acting in this capacity until the Beneficiary has reached the age of termination.
 - **No Successor Account Owner/Custodian On File:**
The owner/custodian of an individual 529 account is deceased, no Successor Account Owner/Custodian is designated, and transfer of ownership is being requested by the executor of the decedent's estate. Please include death certificate for the deceased Account Owner/Custodian as well as executor of estate documentation.
 - If the new Account Owner/Custodian does not already have an account for the Beneficiary, the new Account Owner/Custodian must establish an account.
 - New accounts can be established online at **oklahoma529.com** or with a mailed **Account Application**, or if opening an Entity or Trust Account by completing the **Account Application for an Entity Account**, *however* trust accounts must be opened via a mailed **Account Application for an Entity Account**. Print clearly, preferably in capital letters and black ink.
- **1.877.654.7284**
Monday to Friday 7 a.m. – 7 p.m. CT
- **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

1. Current Account Information

[illegible]

Beneficiary Name

[illegible]**Account Number**

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2. New Account Information

[illegible]

☐ **An Account for this Beneficiary exists for this new Account Owner/Custodian.** *(Please provide account number.)*

[illegible]

☐ **A new Account will be established for this Beneficiary.** *(Please include a new **Account Application** with this form.)*

☐ Successor Account Owner/Custodian

☐ Executor of the Decedent's Estate

Other (Please specify)	
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If an option is not selected below, the transfer amount will be allocated accordingly to the new Account's existing allocation for future contributions.

☐ I want to transfer the assets in-kind. (An "in-kind" transfer will move the selected assets over to the receiving account without a change in currently held investment allocations(s).)

☐ I want to transfer and allocate the assets according to the new Account's current allocations for future contributions. *(By selecting this option, the current investments will be liquidated, and the funds will be deposited into the new Account according to the allocation for future contributions on the new Account.)*

The Successor Account Owner/Custodian or Executor of the deceased Account Owner's/Custodian's Estate must sign below.

New Account Owner's/Custodian's First Name *(M.I.)*

[illegible]

SIGNATURE

$$\boxed{}\boxed{} - \boxed{}\boxed{} - \boxed{}\boxed{}\boxed{}\boxed{}$$

Date (mm-dd-yyyy)

[illegible][illegible][illegible][illegible]

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Zip Code