Scholars Choice Education Savings Plan®

## Transfer Due to Death of Account Owner Form



- 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 the 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.



Overnight mailing address:

Scholars Choice 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131

- 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 with a mailed **Account Application**, or if opening an Entity or Trust Account by completing the **Account Application for an Entity Account.** Print clearly, preferably in capital letters and black ink.

To request assistance in completing this form call us at **1-888-5-SCHOLAR (1-888-572-4652),** Monday through Friday from 9:00 a.m. - 10:00 p.m. ET.

Current Account Information	
Deceased Account Owner/Custodian (First name)	
Deceased Account Owner/Custodian (Last name)	
Last 4 Digits of Social Security Number  or Account Number  —  Account Number	
Please list Beneficiary name and corresponding account number below.	
Beneficiary Name	Account Number



Account Owner/Custodian (First name)  Account Owner/Custodian (Lest name)  Account Owner/Custodian (Lest name)  Belephone Number  Please check one box:  An Account for this Beneficiary exists for this new Account Owner/Custodian. (Please provide account number.)  Existing Account Number  A new Account will be established for this Beneficiary. (Please include a new Account Application with this form  Capacity of Requestor (Please choose one):  Successor Account Owner/Custodian  Executor of the Decedent's Estate  Other (Please specify)  Transfer Type  fan option is not selected below, the transfer amount will be allocated according to the new Account's existing allocation for future contributed one.  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 currently held investments will be liquidated, and the funds will be deposited into the new Account according to the allocation for contributions on the new Account.) This is where the transfer is going to different investment portfolios, and will stay in the same shart successor Account Owner/Custodian or Executor of the deceased Account Owner's/Custodian's Estate must sign below.  As the Successor Account Owner/Custodian or Executor of the deceased Account Owner's/Custodian's Estate, I certify that the information provided in this form is true and complete in all respects.  Base (Signature — YOU MUST SIGN BELOW)  The Successor Account Owner/Custodian or Executor of the deceased Account Owner's/Custodian's Estate, I certify that the information provided in this form is true and complete in all respects.  Base (Signature — YOU may followed in this form is true and complete in all respects.  Base (Signature — YOU may will need your original legal documents returned: (Optional)  Base (Signature — YOU may will need your original legal documents returned: (Optional)		
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A TIAA Company