

3. Update 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 ABLE TN account. You do not need to enter information that will not be changed.
- If you are changing your name, you must also provide a copy of an official document that changes your name. This document must have been certified within 60 days of this request (*i.e. Marriage Certificate, Divorce Decree, etc.*).

Name of Account Owner (*first, middle initial, last*)

Permanent Street Address (*P.O. boxes are **not** 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

State

Zip Code

Telephone Number

4. Transfer assets to a new Account Owner

- This will transfer ownership of all of the assets in the referenced Account to the new Account Owner listed below.
- If you transfer ownership, you must also provide a Medallion Signature Guarantee in **Section 10**.
- The new Account Owner must also complete an **Enrollment Application** if the new Account Owner does not have an Account on file.

Account Number (*If applicable*)

Name of New Account Owner (*first, middle initial, last*)

Social Security Number (**Required**)

Birth Date/Trust Date (*mm/dd/yyyy*) (**Required**)

6. Email Address *(One email address can be associated to your account):*

IMPORTANT: Once your account is established, you can select e-delivery notification by visiting **AbleTN.gov**, registering your account online, and selecting e-delivery notification of statements and/or confirmations when asked for your delivery preference during the registration process. If you provide your email address below, we will send you an email with instructions on how to register your account online.

Please note: After you select e-delivery notification, if an email is returned as “undeliverable”, we’ll attempt to resend it. If the notice continues to be undeliverable after multiple attempts, your delivery preference will be changed to paper, and statements, confirmations, tax forms and other correspondence will be delivered to you via U.S. Mail.

Please provide your email address below:

Email Address

7. Change in eligibility basis or status

Please select the Account Owner’s disability, the onset of which occurred prior to their 26th birthday:

(The following information is required by the federal government and will only be used for aggregate reporting purposes.

Report only one primary code number for an Account Owner. If more than one code applies, select the most significant code.)

- Code 1** - Developmental Disorders: Autistic Spectrum Disorder, Asperger’s Disorder, Developmental Delays and Learning Disabilities
- Code 2** - Intellectual Disability: May be reported as mild, moderate, or severe intellectual disability
- Code 3** - Psychiatric Disorders: Schizophrenia, Major depressive disorder, Post-traumatic stress disorder (PTSD), Anorexia nervosa, Attention deficit/hyperactivity disorder (AD/HD), Bipolar disorder
- Code 4** - Nervous Disorders: Blindness, Deafness, Cerebral Palsy, Muscular Dystrophy, Spina Bifida Juvenile-onset Huntington’s disease, Multiple sclerosis, Severe sensorineural hearing loss, Congenital cataracts
- Code 5** - Congenital Anomalies: Chromosomal abnormalities, including Down Syndrome, Osteogenesis imperfecta, Xeroderma pigmentosum, Spinal muscular atrophy, Fragile X syndrome, Edwards syndrome
- Code 6** - Respiratory Disorders: Cystic Fibrosis
- Code 7** - Other: Includes Tetralogy of Fallot, Hypoplastic left heart syndrome, End-stage liver disease, Juvenile-onset rheumatoid arthritis, Sickle cell disease, Hemophilia, and any other disability not listed under Codes 1 - 6

Basis under which ABLE eligibility is asserted: *(Select only one)*

- The Account Owner is entitled to Supplemental Security Income benefits under Title XVI of the Social Security Act. *(SSI Benefits Eligibility)*
- The Account Owner is entitled to Social Security Disability benefits under Title XVI of the Social Security Act. *(SSDI Benefits Eligibility)*
- The Account Owner self-certifies that he or she meets the Disability Certification requirement, including possessing a written disability-related diagnosis signed by a physician who meets Social Security Act criteria. *(Certification Eligibility)* Please **DO NOT** submit your written disability-related diagnosis, only check this box and keep your diagnosis documentation with you.

8. Signature — YOU MUST SIGN BELOW

- I certify that I have read, understand, consent, and agree to all the terms and conditions of the ABLE TN Disclosure Brochure and understand the rules and regulations governing ABLE TN as they relate to this information change request.
- Please note that if you transfer your assets to a new Account Owner, that Account Owner must be eligible to open an ABLE TN account, and be a Member of the Family, as defined in the ABLE TN Disclosure Brochure, and that they may only have one ABLE account nationwide.
- By signing below, I authorize ABLE TN or its designee to change my account information according to the instructions above.
- If I am an Authorized Individual, I certify that I am authorized to act on behalf of the Account Owner in making this request. If the account is owned by an minor, I further certify that I am the Parent or Guardian or Authorized Individual of the account.

SIGNATURE

Signature of Account Owner, Authorized Individual, or Authorized Agent with Level 4 Authorization
(In the presence of the authorized officer.)

□□ — □□ — □□□□

Date (mm/dd/yyyy)

SIGNATURE

Signature of Co-Authorized Individual (Only if applicable)

□□ — □□ — □□□□

Date (mm/dd/yyyy)

9. Medallion Signature Guarantee — REQUIRED FOR TRANSFERS ONLY.

- 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.**

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 ABLE TN Disclosure Brochure.

SIGNATURE

Signature of Account Owner, Authorized Individual, or Authorized Agent with Level 4 Authorization
(In the presence of the authorized officer.)

Signature of Guarantor

Title

Name of Institution

□□ — □□ — □□□□

Date (mm/dd/yyyy)

Authorized Officer to place stamp here

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