Edvest College Savings Plan

Transfer Due to Death of Account Owner Form



Your Partner in Saving for Higher Education

Monday to Friday 7 a.m. - 9 p.m. CT

1.888.338.3789

www.Edvest.com

Regular mailing address:

P.O. Box 219437

Edvest College Savings Plan

Kansas City, MO 64121-9437

Edvest College Savings Plan

1001 E 101st Terrace, Suite 200

Overnight mailing address:

Kansas City, MO 64131

- 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 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 Edvest.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.

To request assistance in completing this form call us at 1.888.338.3789, Monday through Friday from 7 a.m. – 9 p.m. CT.

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