

UGMA/UTMA Update Form

CollegeCountsSM
Alabama's 529 Fund
ADVISOR PLAN

PO Box 85290
Lincoln, NE 68501-5290
CollegeCounts529advisor.com

- Complete this form to change or add a successor custodian to an existing CollegeCounts 529 Fund UGMA or UTMA account.
- Please complete and return this form to:

Regular Mail:

CollegeCounts 529 Fund
PO Box 85290
Lincoln, NE 68501-5290

Overnight Mail:

CollegeCounts 529 Fund
6811 S. 27th Street
Lincoln, NE 68512

- For assistance, call toll-free: 866.529.2228 or contact your financial advisor.

1 CollegeCounts 529 Fund Account Information

Account Number

Account Owner's Social Security Number

Current UGMA/UTMA Custodian's First Name M.I. Last Name

Phone

Designated Beneficiary's First Name M.I. Last Name

2 Change or Add a Successor Custodian

A successor custodian becomes the custodian if the current custodian dies or is declared legally incompetent. Any successor custodian currently named to the Account will be removed upon receipt of this form.

Successor Custodian's First Name M.I. Last Name E-Mail

Successor Custodian's Social Security Number

Date of Birth

Address City, State, ZIP

Permanent Address (if different from above; no PO Boxes) City, State, ZIP

Residency Status: U.S. Citizen U.S. Resident Alien

3 Authorization

I certify that all of the information contained herein is true and correct. I direct the CollegeCounts 529 Fund to make the change that I have indicated above.

X

Signature of Account Owner

Date



Offered by the
State of Alabama

UBT 529 Services a Division of

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Program Manager

Questions? Please call toll-free 866.529.2228.