



Use this form to transfer all or part of an account from the current Account Owner(s) to new Account Owner(s) for all reasons other than death of the Account Owner. If the Account Owner is deceased, please complete the Change of Ownership Form – Deceased Account Owner found at FutureScholar.com. If you have questions about completing this form, please call us at 1.888.244.5674, Monday through Friday, from 8:00 a.m. to 7:00 p.m. (ET).

Transferring Ownership:

The Account Owner can transfer ownership to any U.S. resident over the age of 18.

If an Account Owner is unable to transfer the account due to incapacitation, the named successor Account Owner may assume ownership of the account. **If there is no successor Account Owner on file or the successor Account Owner is deceased or incapacitated**, eligibility for ownership follows the lines of succession as described in the [Program Description](#) and listed below:

1. The surviving spouse of the Account Owner, provided he or she is the natural or adoptive parent of the Designated Beneficiary, is eligible to become the Account Owner.
2. In the event there is no surviving spouse who is a parent of the Designated Beneficiary, and the Designated Beneficiary is not a minor, the Designated Beneficiary is eligible to become the Account Owner.
3. If the Designated Beneficiary is a minor, the Designated Beneficiary's custodial guardian is eligible to become the Account Owner. If the Designated Beneficiary has more than one custodial guardian, the oldest custodial guardian is eligible to become the Account Owner.
4. If the Designated Beneficiary predeceases the Account Owner or dies in a manner that it cannot be determined who died first, the Estate of the Designated Beneficiary is eligible to become the Account Owner.

How does the new Account Owner assume ownership?

- The new Account Owner must open a Future Scholar account registered in their name for the same Designated Beneficiary. You can open an account online at FutureScholar.com or, by mailing a completed Account Application along with the Change of Ownership Form.
- The existing Account Owner must complete this Change of Ownership Form. The signature verification requirement on this form (Section V) varies as follows:
 - If transferring ownership to a designated successor Account Owner who has been on file for at least 30 days OR transferring an UGMA/UTMA account to the designated beneficiary who has reached the age of majority, **a notarized signature is required**.
 - For all other ownership transfers, **a Medallion Signature Guarantee (MSG) is required**. An MSG can be obtained by a financial institution and through online service providers.

What happens if the account owner is incapacitated and unable to initiate the transfer of ownership request?

- If the Account Owner is incapacitated and unable to initiate a transfer of ownership, please contact the service center for required documentation.

Please return the completed form by mail:

Regular Mail:

Future Scholar 529 Plan
P.O. Box 219812
Kansas City, MO 64121-9812

Overnight Mail:

Future Scholar 529 College Savings Plan
801 Pennsylvania Ave STE 219812
Kansas City, MO 64105-1307

I. Reason for Changing Ownership

Please check one:

- UGMA/UTMA** – Minor reaches age of majority.
- Court Order** – The transfer is requested in compliance with the attached court order certified within 60 days of presentment.
- Current Account Owner(s)** – Rescinding ownership.
- Adding a Joint Owner** – Available for spouses only.
- Other** – Briefly explain below.

II. Current Account Information

A. Designated Beneficiary's Account Information

Current Account Number

Designated Beneficiary's First Name

Middle Initial

Last Name

Designated Beneficiary's Social Security Number or other Taxpayer Identification Number

Date of Birth (MM/DD/YY)

B. Account Owner Information

If not an individual, indicate the type of entity (e.g., a trust) and insert the entity's legal name.

Primary Account Owner's First Name (or entity name)

Middle Initial

Last Name

Social Security Number or other Taxpayer Identification Number

Date of Birth (MM/DD/YY)

Joint Account Owner's First Name

Middle Initial

Last Name

Mobile Phone Number

Home Phone Number

III. New Account Owner Information

Check this box if account is being transferred to an existing account already established.

Existing Account Number

If you do not have a new account established, please enclose an Account Application with your Change of Ownership Form.

Primary Account Owner's First Name (or entity name)	Middle Initial	Last Name

Social Security Number or other Taxpayer Identification Number

Joint Account Owner's First Name	Middle Initial	Last Name

Contact telephone number

IV. Amount of Transfer

Note: Any account options will not be carried over automatically.

Check One:

Transfer entire account balance. The account listed in Section I will be closed and all of the assets will be transferred to an account for the new account owner(s).

Partial transfer as detailed below.

Portfolio name	Portfolio number	Amount	Percentage
_____	OR <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	OR _____ %
_____	OR <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	OR _____ %
_____	OR <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	OR _____ %
_____	OR <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	OR _____ %
_____	OR <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	OR _____ %

V. Signature Section

By signing below, I certify that the information provided on this form is in all respects true, complete and correct, that the information change(s) and/or action authorized on this form is to be reflected or taken, as applicable, in accordance with the current Future Scholar 529 College Savings Plan Program Description, and that I fully understand the consequences of such change(s) and/or action.

This form must be signed in capacity and will require a Medallion Signature Guarantee or a Notary Stamp. See below for more details.

Print Name of Account Owner or Authorized Individual

Print Name of Joint Account Owner, if applicable

X _____
Signature of Account Owner (Include capacity, if applicable)

X _____
Signature of Joint Account Owner (required for joint registration)

Signature & Stamp Requirement

A notary is required when transferring ownership to a designated successor Account Owner OR transferring an UGMA/UTMA account to the designated beneficiary who has reached the age of majority. All other transfers require a Medallion Signature Guarantee Stamp.

Medallion Signature Guarantee Stamp or Notary Stamp*

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*A Medallion Signature Guarantee helps assure that a signature is genuine and not a forgery. A Medallion Signature Guarantee must be provided by an eligible guarantor institution including, but not limited to, the following: bank, credit union, savings association, broker or dealer, that participates in the Securities Transfer Association Medallion Program (STAMP), the Stock Exchange Medallion Program (SEMP) or the New York Stock Exchange Medallion Signature Program (MSP). The Transfer Agent reserves the right to reject a signature guarantee and to request additional documentation for any transaction.