

Maryland Prepaid College Trust Change of Account Holder Form

Maryland529

PREPAID COLLEGE TRUST

✓ **Use this form to:**

- Change the Account Holder or Custodian.
- Change or add an Account Holder's Successor.

NOTE: We will return this form to you if it is incomplete, including **ANY** missing information from sections 2 or 3 (as applicable).

📎 Please note this form requires a Medallion Signature Guarantee of the Account Holder's signature.

Complete form and return it to:

Maryland Prepaid College Trust
217 E. Redwood Street, Suite 1350
Baltimore, MD 21202

Include the \$10 fee unless the change is due to the Account Holder's death or disability, or if the only change you are making is to the Successor. If the current Account Holder (or Custodian, if applicable) is deceased or legally incompetent, call for required documentation.

Print or type all information except your signature. Original signature is required.

1 Current Account Information

Account Holder (Trust name if applicable)	Social Security/Tax ID Number
Custodian or Trustee (if applicable)	
Beneficiary	Social Security Number
Account Number	

2 New Account Holder or Custodian (if applicable)

Provide the name of the new Account Holder or Custodian.

Name		Citizenship: <input type="checkbox"/> U.S. Citizen <input type="checkbox"/> U.S. Resident Alien	
<input type="checkbox"/> Account Holder <input type="checkbox"/> Custodian			
Social Security/Tax ID Number		Date of Birth (mm/dd/yyyy)	
Mailing Address			
City		State	ZIP Code
Day Phone		Evening Phone	
Email			

3 Account Holder's Successor (if applicable)

Complete this section to change or add an Account Holder's Successor on the current Account. An Account Holder's Successor takes control of the Account if the Account Holder dies or becomes legally incapacitated. This will replace any Account Holder's Successor already on file for this account.

Name		Citizenship: <input type="checkbox"/> U.S. Citizen <input type="checkbox"/> U.S. Resident Alien	
Social Security/Tax ID Number		Date of Birth (mm/dd/yyyy)	
Mailing Address			
City		State	ZIP Code
Day Phone		Evening Phone	
Email			

Check yes or no if you want the Successor to have rights to information on the account. YES NO

4 Signature

By signing this form, I hereby certify and acknowledge that:

- The information in this form is accurate. I agree to hold harmless Maryland 529, the Prepaid College Trust, and the Trustee, for any losses arising out of any misrepresentations made by me or breach of acknowledgments contained in this form.
- I authorize Maryland 529 and the Prepaid College Trust, their agents, and their affiliates to act on instructions in this form believed to be genuine and from me.

4 Signature (cont.)

I have neither given nor received any payment or other consideration for the transfer of the Contract. In doing so, I acknowledge that I relinquish all rights and responsibilities of the contract to the New Account Holder.

CURRENT ACCOUNT HOLDER SIGNATURE AND DATE REQUIRED

Current Account Holder or Custodian (if Account Holder is a minor) or Trustee(s)	Date (mm/dd/yyyy)
X	

Medallion Signature Guarantee is required for current Account Holder:

You can obtain the Medallion Signature Guarantee from most banks, savings institutions or broker-dealers. We cannot accept guarantees from notaries public or non-Medallion guarantors. The level of coverage provided by the guarantor's stamp must cover the dollar amount of the transaction or it may be rejected.

MEDALLION SIGNATURE GUARANTEE

Place Medallion Stamp Below:	Name of Institution
	Print Name of Person Providing Guarantee
	Date (mm/dd/yyyy)

I certify and attest that as the new Account Holder, I have read and agree to the terms and conditions of the Contract and that I meet the criteria as specified in the Contract. I also certify that I have neither given nor received payment or other consideration for the transfer of the Contract.

NEW ACCOUNT HOLDER SIGNATURE AND DATE REQUIRED

New Account Holder or Successor or Custodian signature	Date (mm/dd/yyyy)
X	