

Custodian's Designation of Successor Custodian to UTMA/UGMA Account



Return Options:

Electronically via Message Center:

Log in and go to Client Services > Message Center to attach the file

Regular Mail:

PO Box 2270, Omaha, NE 68103-2270

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200 South 108th Avenue
Omaha, NE 68154-2631

Fax: 866-468-6268

For use with Uniform Transfers to Minors ACT (UTMA)
or Uniform Gift to Minors Act (UGMA) accounts.

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Custodian Information

I represent and certify to TD Ameritrade and their clearing firm, TD Ameritrade Clearing, Inc., that I am the appointed custodian for

Account Number:

Full Legal Name of Minor:

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Successor Custodian Information

I designate as successor custodian to said UTMA/UGMA account

Full Legal Name of Successor:

City:

State:

This designation of successor custodian does not take effect until the undersigned custodian resigns in writing, dies, becomes incapacitated, or is removed as custodian. This is not a designation of a substitute custodian.

In consideration of the foregoing and other good and adequate consideration, the sufficiency of which is hereby acknowledged, I agree to indemnify and hold harmless TD Ameritrade and TD Ameritrade Clearing, Inc. from any and all loss, cost, judgment penalty, claim, action, damage, expense, attorneys' fees, and all monetary sums arising or resulting from or following the effectuation by TD Ameritrade and TD Ameritrade Clearing, Inc. of the instructions stated within this designation of successor custodian or of any acts reasonably necessary to the effectuation thereof. The representations, certifications, statements, and agreements set forth in this document shall insure to the benefit of TD Ameritrade and TD Ameritrade Clearing, Inc., their assigns, or any successor firm irrespective of any change at any time in the personnel thereof, for any cause whatsoever. The representations, certifications, statements, and agreements set forth in this document shall bind the undersigned custodian, any successor custodian, other successor fiduciary, or any other successor in interest in the same manner and with the same force that the undersigned is hereby bound.

Acting Custodian's Signature:

Date:

X

Sign Here

Original signatures are required; electronic signatures and/or signature fonts are not authorized

Investment Products: Not FDIC Insured * No Bank Guarantee * May Lose Value

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