

TD Ameritrade 529 College Savings Plan
Successor Account Owner
Add or Change Form

Return this Form to:

TD Ameritrade 529
 P.O. Box 85529
 Lincoln, NE 68501-5529

Overnight Mail:

TD Ameritrade 529
 3606 South 48th Street
 Lincoln, NE 68506

If you have questions, please call us at **877.408.4644**,
 Monday–Friday, 7 a.m. to 7 p.m. (CT).

1. Current Account Information

Account Number(s): _____

Account Owner Name (First, M.I., Last): _____

Mobile Phone Number: _____

Secondary Phone Number: _____

Name of Beneficiary (First, M.I., Last): _____

2. Add or Change a Successor Account Owner

You may name a Successor Account Owner to take control of the Account in the event you die or become legally incompetent.

- Remove the current Successor Account Owner without designating a new Successor Account Owner
- Add a new Successor Account Owner

Successor Account Owner Name (First, Middle, Last): _____

Successor Account Owner Date of Birth (MM/DD/YYYY): _____

Successor Account Owner City, State: _____

3. Authorization

By signing below, I certify that I am the Account Owner of the Account(s) indicated on this form and that the information contained herein is true, complete, and correct. **This designation will replace the Successor Account Owner currently named on the Account(s).**

Signature and Date Required

X		
	Signature of Account Owner, Custodian (UGMA/UTMA Accounts), or Trustee	Date
	Print Name Here	
	Title (if other than an individual)	

Securities Products: Not FDIC Insured - No Bank Guarantee - May Lose Value

Nebraska Educational Savings Plan Trust, Issuer. TD Ameritrade, Inc., sub-administrator. TD Ameritrade Investment Management, LLC, portfolio consultant.

Union Bank and Trust Company renders certain distribution services to the Plan. TD Ameritrade, Inc. renders certain marketing and administrative services to the TD Ameritrade 529 College Savings Plan. TD Ameritrade Investment Management, LLC renders portfolio consulting services to Union Bank and Trust Company and the Nebraska Investment Council. TD Ameritrade, Inc., member FINRA/SIPC, and TD Ameritrade Investment Management, LLC are subsidiaries of The Charles Schwab Corporation. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and the Toronto-Dominion Bank. All rights reserved. Used with Permission.



UBT
 Union Bank & Trust
 Program Manager