

TD Ameritrade 529 College Savings Plan Account Update 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. Update Account Owner or Beneficiary Name

These changes apply to the:

Account Owner

Beneficiary

Former Name (First, M.I., Last): _____

New Name (First, M.I., Last): _____

Reason for change:

Marriage (attach copy of marriage certificate)

Divorce (attach copy of divorce decree)

Other (please specify and attach a copy of applicable legal documentation): _____

3. Update Account Owner or Beneficiary Contact Information

These changes apply to the:

Account Owner

Beneficiary

Street Address (no P.O. Boxes) _____

City, State, Zip: _____

Mailing Address (if different from above): _____

City, State, Zip: _____

Mobile Phone Number: _____

Secondary Phone Number: _____

Email Address: _____

4. eDelivery

- Select this option to sign up to receive quarterly account statements, Program Disclosure Statements, confirmations, tax forms, supplements, compliance materials, plan news and updates via electronic delivery.

IMPORTANT: You will receive a confirmation email from the TD Ameritrade 529 College Savings Plan that will enable you to complete the eDelivery sign up and selection process.

I request that email notifications be sent to the following email address:

I consent to the delivery of documents that are governed under the TD Ameritrade 529 College Savings Plan Electronic Delivery of Documents.

I understand that when a document or statement is available, I will receive an email notification from the TD Ameritrade 529 College Savings Plan. The email will include a link to the TD Ameritrade 529 College Savings Plan secure site, where the document(s) can be viewed and downloaded.

I acknowledge that I have Internet access, an email address, and all software necessary to receive and review documents electronically.

You may revoke this election at any time by contacting the TD Ameritrade 529 College Savings Plan or logging into your Account and requesting paper delivery.

5. 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.

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)



UBT
Union Bank & Trust
Program Manager

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.