MI 529 Advisor Plan

Transfer Due to Death of Account Owner Form



Monday to Friday 8:30 a.m. - 6 p.m. ET

1.866.529.8818

Regular mailing address:

Boston, MA 02205-58473

Overnight mailing address:

95 Wells Avenue, Suite 155

MI 529 Advisor Plan

Newton, MA 02459

MI 529 Advisor Plan

P.O. Box 55847

www.mi529advisor.com

- Use this form to transfer the Account Ownership (or custodianship on an UGMA/UTMA account) due to death.
- Complete this form for each new account owner/custodian.

Successor Account Owner/Custodian On File:

The owner/custodian of an individual 529 account is deceased, a Successor Account Owner/Custodian is designated for the account specified, and transfer of ownership is requested by Successor Account Owner/Custodian. Please include death certificate for the deceased Account Owner/Custodian if one is not already on file. **Note:** If your Account is an UTMA/UGMA Account, the Successor Custodian is only acting in this capacity until the Beneficiary has reached the age of termination.

No Successor Account Owner/Custodian On File:

The owner/custodian of an individual 529 account is deceased, no Successor Account Owner/Custodian is designated, and transfer of ownership is being requested by the executor of the decedent's estate. Please include death certificate for the deceased Account Owner/Custodian as well as executor of estate documentation.

- If the new Account Owner/Custodian does not already have an account for the Beneficiary, the new Account Owner/Custodian must establish an account.
 - New accounts can be established with a mailed **Account Application**, or if opening an Entity or Trust Account by completing the **Account Application for an Entity Account**. Print clearly, preferably in capital letters and black ink.

To request assistance in completing this form call us at 1.866.529.8818, Monday through Friday from 8:30 a.m. - 6 p.m. ET.

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