

SMART529 WV Direct

# Account Information Change Form



SMART529 is a program of the West Virginia College Prepaid Tuition and Savings Program Board of Trustees and is administered by Hartford Funds Management Company, LLC

- Any of the following can be changed online by logging into your Account or by completing this form: your address, telephone number, email address, or Successor Account Owner.
- If you are changing your name, your former signature and your new signature must be Notarized in **Section 6** by a Notary Public or provide certified copies of the appropriate legal documents.
- If you are changing the Account Owner of an existing Account, your signature must be Notarized in **Section 6** by a Notary Public and the new Account Owner must include an **Account Application**.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below, or return by fax at **1.877.486.9270**. Do not staple.

Fillable forms can be downloaded from our website at **www.SMART529.com**, or you can call us to order any form—or request assistance in completing this form—at **1.866.574.3542**, Monday–Thursday 8 a.m. to 7 p.m. Eastern time and Friday 8 a.m. to 6 p.m. Eastern time.

Return this form and any other required documents to:  <b>SMART529 WV Direct</b> <b>P.O. Box 55362</b> <b>Boston, MA 02205-5362</b>	For overnight delivery or registered mail, send to:  <b>SMART529 WV Direct</b> <b>95 Wells Ave., Suite 155</b> <b>Newton, MA 02459-3204</b>
---	---

## **1.** Current Account Owner information








































Account Number(s) *(To list more than three Accounts, use a separate sheet.)*
























Name of Account Owner *(first, middle initial, last)*












Telephone Number *(In case we have a question about your Account.)*



## 2. Updated Account Owner information

- If you are changing your name and/or contact information, provide the new information exactly as you would like it to appear on your account with SMART529 WV Direct.
- If you are changing your name, you must also provide a Notarized Signature in **Section 6**, or provide a certified copy of the appropriate legal documents.
- **Important:** If you are changing your mailing address, there will be a nine (9) business day hold put on your account before you can request a distribution of funds to be sent to the new address. If you want the funds released prior to the waiting period, a Notarized Signature is required at the time of distribution.

Name of Account Owner (*first, middle initial, last*)

 —  — 

Telephone Number

Email Address

Permanent Street Address (*A P.O. Box is **not** acceptable.*)

City

State

 — 

Zip Code

Account Mailing Address if different from above (*This address will be used as the Account's address of record and for all Account mailings.*)

City

State

 — 

Zip Code

## 3. Transfer assets to new Account Owner

- This will transfer ownership of all of the assets in the referenced Account to the new Account Owner listed below.
- The new Account Owner will control the Account and the disposition of all assets held in the Account.

### Check one.

The new Account Owner does not have an existing Account and has included an **Account Application**.

The new Account Owner has an existing Account.

 — 

Account Number (*If applicable*)

Name of New Account Owner (*first, middle initial, last*)

 —  — 

Social Security Number or Taxpayer Identification Number (**Required**)

 —  — 

Birth Date/Trust Date (*mm/dd/yyyy*)



