



West Virginia College
Prepaid Tuition and Savings
Program Board of Trustees

SMART529 WV Prepaid Tuition Plan

SMART529 is a program of the West Virginia College Prepaid Tuition and Savings Program Board of Trustees

Service Center:
Toll-free at 1-866-574-3542
Monday – Friday, 8:00 a.m. to 6:00 p.m. EST
Fax Nbr: 1-800-519-4652

Mail:
SMART529 WV Prepaid Tuition Plan
PO Box 44070, Jacksonville, FL 32231- 4070

Internet Address:
SMART529.com

Successor Owner Designation Form

The Account Owner may designate a Successor Owner to assume the responsibilities and duties of the Account Owner in the event of the death or disability of the Account Owner. These responsibilities and duties are defined in the Disclosure Statement and Participation Agreement. The Successor Owner may be an individual, at least 18 years of age, or a corporation, partnership, trust or other entity. The Successor Owner has no rights in regard to the account and cannot direct any changes, conversions, transfers or cancellations, except in the event of the death or disability of the Account Owner. The Account Owner may change the designation of the Successor Owner at any time by submitting a new Successor Owner Authorization Form.

1. Account Owner Information

Account Owner Name
Last First MI

Account Owner Address
Street City State Zip

Daytime Phone Evening Phone Social Security Number
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2. Account Information

Please indicate accounts that this change should apply to

Account Number	Designated Beneficiary Name		
	Last	First	MI
	Last	First	MI
	Last	First	MI
	Last	First	MI
	Last	First	MI
	Last	First	MI

3. Successor Owner Information

Please check one: Designate for the first time Change Successor Owner

Name
Last First MI

Address
Street City State Zip

Date of Birth Social Security Number (or FEIN) Gender Daytime Phone Evening Phone
/ / - - Male Female () ()

4. Signatures

By signing below it is my intention to designate a Successor Owner, revoke an existing Successor Owner designation, or revoke the existing Successor Owner and designate a new Successor Owner for my Account. I hereby certify that a) the above information relating to residency is true and correct; b) all information in the application is true and accurate to the best of my knowledge; and c) I have received and agree to be bound by the terms of the SMART529 College Savings Option Offering Statement and Participation Agreement.

Account Owner Signature

Date

IMPORTANT INFORMATION ABOUT CUSTOMER IDENTIFICATION. Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open a SMART529 Account, you will be asked to provide your name, address, date of birth, and other information that identifies you such as a Social Security Number or a tax identification number. You may also be asked to provide a copy of your driver's license or other identifying documents.