CollegeInvest Stable Value Plus College Savings Plan

Beneficiary Change Form

◆ **CollegeInvest**®
WE HELP YOU GET THERE

Complete this form if you are transferring to a new Beneficiary the full or partial balance in the account for the current beneficiary. If you do not have an account for the new Beneficiary, you can create a new account by logging into your Stable Value Plus account and click on **Add New Account**. A new account must be created for the new Beneficiary who is a member of the family. For assistance, please call (800) 448.2424 or email general@collegeinvest.org.

Current Account Information   (Please Print)

Account Owner's Name	Account Number
Email Address	Current Beneficiary's Name

New Beneficiary Information   (Please Print)

I wish to change the designated Beneficiary for this account to the new individual named below.

☐ I certify that the new Beneficiary is a member of the family of the current Beneficiary.

Note: If the new beneficiary isn't an eligible member of the family of the original beneficiary, then this change will be treated as a nonqualified withdrawal, and the earnings may be subject to taxes and penalties.

☐ I certify that no amounts in this account have been transferred from a Uniform Gift/Transfer to Minors Act (UGMA/UTMA) Custodial Account. If such transfer(s) have occurred, I understand that I cannot name a new Beneficiary or make non-qualified distributions other than for the benefit of the original Beneficiary.

New Beneficiary's Name	New Beneficiary's Social Security Number
New Beneficiary's Date of Birth	New Beneficiary's Account Number

Transfer Amount

☐ Full Balance – this will close the account for the existing beneficiary.

☐ Partial Balance – List the Amount to Transfer $ _____

Signature Required

By signing below, I certify that I have received, read and agree to the terms and conditions of the Stable Value Plus Plan Disclosure Statement. I understand that the terms and conditions will apply to the account held for the New Beneficiary. **I understand this program is not guaranteed by the State of Colorado, CollegeInvest, any other government agency any affiliates of the Nationwide, or any other person or entity**.

Account Owner's Signature	Date

Return the completed form to: CollegeInvest, 1600 Broadway, Suite 2300, Denver, CO 80202