

Voluntary Transfer of Ownership



Use this form to transfer ownership to another account owner. The new account owner must complete a Stable Value Plus Enrollment Application prior to this form being processed. Complete, sign and mail this form to: CollegeInvest, 1600 Broadway, Suite 2300, Denver, CO 80202. For assistance, please call (800) 448-2424 or email general@collegeinvest.org. Stable Value Plus will notify the current account owner and new account owner in writing regarding the effective date of the transfer.

Section 1. Account Information and Current Account Owner Authorization

I, _____, current account owner of account number _____ for the beneficiary/student _____, from Stable Value Plus, hereby authorize the transfer of this account to _____.

I understand that all of my rights and responsibilities under this account will be transferred in full to the new Account Owner.

Section 2. New Account Owner Information

Name of New Account Owner: _____ Account Number: _____

Signature of New Account Owner: _____ Date of Signature: _____

Stable Value Plus makes no representation regarding individual tax implications to the current or new Account Owner and recommends that the parties involved in the transfer consult their tax advisors.

Section 3. Signature of Current Account Owner _____ Date _____

Your signature must be notarized. See below. We cannot accept a signature guarantee in place of a notary’s seal.

STATE OF _____)

COUNTY OF: _____)

This document was acknowledged before me on _____(date) by _____
(name of account owner), who certifies the correctness of the signature of the account owner.

Signature of Notary _____ Date _____

Notary Public’s Name (first, middle initial, last) _____ My Commission Expires _____

