



NextGen College Investing Plan[®]

Change of Participant Form

For use with Merrill Edge Self-Directed Accounts only



INSTRUCTIONS: Complete this form if you would like to transfer all of your assets from your NextGen College Investing Plan Client Direct Series Account ("NextGen Account"), listed below, to a new Participant. Prior to submitting this form, the new Participant must open a new NextGen Account at **merrilledge.com**. Please be advised that Merrill Edge[®] requires a new account be established for the new participant before the change can be completed. In order to open a new account visit **merrilledge.com** or complete a NextGen Direct Series Application and include it with the completed Change of Participant Form. Upon the change of Participant on a NextGen Account, the new Participant assumes all rights of ownership described in the NextGen Program Description, including but not limited to the ability to change investments, change the Designated Beneficiary and direct withdrawals from the NextGen Account.

This form may be used only to change the Participant on the account. If the new Participant wishes to change the Designated Beneficiary, the new Participant must complete a Change of Designated Beneficiary form in addition to this form. To obtain a Change of Designated Beneficiary form, log in to your account at **merrilledge.com** or contact a Merrill Edge Self-Directed Service Associate at **877.653.4732**.

1. CURRENT PARTICIPANT INFORMATION

Name (Last/First/M.I.) or Name of Custodianship/Trust/Corporation

Date of birth (month/day/year)

Social Security number

Street address (no P.O. box)

NextGen Account number

City

State

ZIP code

2. NEW PARTICIPANT INFORMATION

Name (Last/First/M.I.) or Name of Custodianship/Trust/Corporation

New participant phone number

Street address (no P.O. box).

Date of birth (month/day/year)

City

State

ZIP code

Social Security number

Mailing address (if different from street address)

New NextGen Account number

Note: If a new account has been established online via merrilledge.com, please indicate the new NextGen account number here.

City

State

ZIP code

3. CURRENT PARTICIPANT SIGNATURE

I certify that the instructions and information provided herein are true and correct and comply with the NextGen College Investing Plan Program Description and Participation Agreement.

By signing below, I acknowledge that I understand the consequences of this transfer and agree that this transfer is irrevocable and transfers all rights, title, interest and power (including the power to use the NextGen assets for any purpose) over the NextGen Account and its assets to the new Participant designated herein.

Signature of current participant

Date

4. NEW PARTICIPANT SIGNATURE

I have established a NextGen College Investing Plan Client Direct Series Account and consent and agree to all the terms and conditions of the NextGen College Investing Plan Participation Agreement, which is incorporated herein by reference. I acknowledge that I have read the NextGen College Investing Plan Program Description, the Participation Agreement and Bank of America Privacy Policy, and will retain a copy of each for my records. If I have a Merrill Lynch central asset account, I further acknowledge and agree that the Participation Agreement will govern all aspects of the NextGen Account, including all contributions to my NextGen Account.

BY SIGNING BELOW, I ACKNOWLEDGE: (1) THAT I AM IN RECEIPT OF A COPY OF THE NEXTGEN COLLEGE INVESTING PLAN PROGRAM DESCRIPTION AND PARTICIPATION AGREEMENT AND ANY SUPPLEMENT(S) AND (2) THAT IN ACCORDANCE WITH PARAGRAPH 23 OF THE PARTICIPATION AGREEMENT (ON THE LAST PAGE(S) OF THE PROGRAM DESCRIPTION AND PARTICIPATION AGREEMENT), I AM AGREEING IN ADVANCE TO ARBITRATE ANY CONTROVERSIES WHICH MAY ARISE WITH THE PROGRAM MANAGER:

Signature of new participant

Date

NOTE: CONTRIBUTIONS TO, OR WITHDRAWALS FROM, THIS PROGRAM MAY BE TREATED LESS FAVORABLY FOR STATE INCOME TAX AND OTHER PURPOSES THAN CONTRIBUTIONS TO A SECTION 529 PROGRAM OFFERED BY THE STATE IN WHICH THE INVESTOR RESIDES OR PAYS TAXES.

PLEASE FOLLOW THESE MAILING INSTRUCTIONS TO AVOID DELAYS IN PROCESSING

Merrill Edge will process the Change of Participant request upon receipt of this completed form and verification that a new account has been established for the new Participant.

Return to:

Merrill Edge/Service and Operations
MSC NJ2-140-02-13
P.O. Box 1501
Pennington, NJ 08534



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Are Not FDIC Insured

Are Not Bank Guaranteed

May Lose Value