

Section 529 Successor Participant Change Form

INSTRUCTIONS: Complete this form to change or add a Successor Participant to your 529 Account. This person will become the account owner of the 529 Account, with all rights and privileges, in the event of your death or mental incapacity. The Successor Participant must be 18 years or older. Please print clearly. The form must be signed by the Participant (account owner). **Submit your completed form to:**

Regular mail:

Merrill Document Processing
PO Box 31024
Tampa, FL 33631-3024

Overnight mail:

Merrill Document Processing
FL1-908-01-36
4909 Savarese Cir
Tampa, FL 33634

1. 529 Account Information

Participant name (Last / First / M.I.)

529 Account number

Participant Social Security number or Tax ID

Designated Beneficiary name

Add a new Successor Participant

Change Successor Participant

Eliminate Successor Participant

2. Current Successor (If Applicable)

Please print the name of the person you would like to remove as Successor Participant on your 529 Account.

Name (Last / First / M.I.)

Please Note: If you have selected Change Successor Participant or Eliminate Successor Participant, the person currently listed on your 529 Account as Successor Participant (and named above) will be removed from your account.

3. New Successor Participant

Please print the name and Social Security or Tax Identification number of the person or entity you would like to name as a Successor Participant.

Name (Last / First / M.I.)

Successor Participant Social Security number or Tax ID

4. Signature of Participant

Signature of Participant (required)

Date

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BoFA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BoFA Corp.

Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
-----------------------------	--------------------------------	-----------------------