



Successor Account Owner/Custodian Designation Form

Complete this form to designate or change the Successor Account Owner on your Montana Family Education Savings Program (MFESP) Account. If the original Account Owner dies, the Successor Account Owner named on this form will become the Account Owner. If no Successor Account Owner has been designated, the Beneficiary will become the Account Owner. The Beneficiary's custodian will act as Account Owner on behalf of the beneficiary if the beneficiary is a minor. An Account may only have one Successor Account Owner. A Successor Account Owner must be a U.S. taxpayer. You may revoke or change the Successor Account Owner designation at any time. Please see the MFESP Disclosure Statement (Disclosure Statement). The designation of a Successor Account Owner may limit the maximum FDIC insurance coverage on this Account.

Forms can be downloaded from our website at www.collegesavings.com/montana, or you can call us to order any form—or request assistance in completing this form—at **1.800.888.2723**, Monday through Friday, from 9 a.m. to 6 p.m. Eastern Time.

Make checks and electronic transfers payable to: **MFESP-Bank Plan, CSB as Manager**

Mail or Fax this form and any other required documents to:

- **Mail - College Savings Bank, 2515 McKinney Ave, Suite 1100, Dallas, TX 75201**
- **Fax - 214.481.1289 ATTN: Operations**

1. Account Information

Account Number		
Account Owner or Custodian First Name	MI	Last Name
Social Security Number		Telephone Number
Beneficiary's First Name	MI	Last Name
Social Security Number		Telephone Number

2. Successor Account Owner or Successor Custodian (for UGMA/UTMA Account)

Please check one: Designate Successor Account Owner/Custodian
 Change existing Successor Account Owner/Custodian

Successor Account Owner First Name	MI	Last Name
Street Address		
City	State	Zip Code
Social Security Number	Date of Birth	Telephone Number

3. Signature

I authorize MFESP, to make the Successor Account Owner designation or change specified in this form. I have received, read, understand, consent and agree to the Disclosure Statement. I certify that the information I have provided with respect to my Account is true, complete and accurate. I agree that the Plan Officials (as defined in the Disclosure Statement) will not incur any loss, liability, damage or expense for relying upon any instructions by me believed to be genuine.

Account Owner or Custodian Signature	Date

Note: A Signature Guarantee from your bank or credit union is required for all Successor Account Owner designations and/or changes if this form is not sent in with the Enrollment Form at the time the account is established. Faxes will not be accepted.

Signature Guarantee