

### U.Plan Ownership Change Request Form

In order to process your request to change ownership, please complete this form.

If the ownership is being changed because the current owner is deceased the following documentation is required:

- o Original death certificate
- o Original certificate (with raised seal) or executor's appointment issued by the probate court

We will return original death certificate and certificates of appointment upon request.

The ownership change form must be notarized in order to complete the request.  
Return the completed form to:

MEFA  
c/o U.Plan Prepaid Tuition Program  
P.O. Box 55251  
Boston, MA 02205-8220

If you have any questions please contact MEFA at 800.449.MEFA (6332), option #1 or info@mefa.org

#### Section A: Current U.Plan Account Information

Owner Name: \_\_\_\_\_ Account Number: \_\_\_\_\_

Beneficiary Name: \_\_\_\_\_

#### Section B: New Owner Information (all information is required). This certifies that all certificates will be transferred to the new Owner

Name of New Owner: \_\_\_\_\_ Social Security  
Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Relationship to Beneficiary: \_\_\_\_\_

Address: \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Section C: Owner Authorization**

As Owner of the Tuition Certificate(s) for the above-referenced U.Plan account, I hereby instruct the Massachusetts Educational Financing Authority (MEFA) to change the Ownership for the Certificate(s).

Signature of Owner: \_\_\_\_\_

Date: \_\_\_\_\_

As the new Owner of the of the Tuition Certificate(s) for the above-referenced U.Plan account, I agree to honor the terms of the U.Plan as outlined in the Program Description and Offering Statement.

Signature of New Owner: \_\_\_\_\_

Date: \_\_\_\_\_

**Section D: NOTARY PUBLIC (Required)**

State of: \_\_\_\_\_ County of: \_\_\_\_\_

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned notary public, personally appeared \_\_\_\_\_ (name if document signer), proved to me through satisfactory evidence of identification, which were \_\_\_\_\_, to be the person whose name is signed on the preceding or attached document in my presence.

Official Signature and Seal of Notary: \_\_\_\_\_