

U.Plan Beneficiary Change Request Form

If you would like to change the beneficiary on your U.Plan account, please complete the U.Plan Beneficiary Change Request Form. Provide all requested information to ensure timely processing of your request. Return the completed form to:

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

Section A: Current U.Plan Account Information

Owner Name: _____ Account Number: _____

Current Beneficiary Name: _____

Current Beneficiary's Social Security Number: _____

Section B: Beneficiary Change Instructions

This certifies that all certificates will be transferred to the new Qualifying Beneficiary.

New Beneficiary Name: _____

New Beneficiary's Existing U.Plan Account Number (if any): _____

New Beneficiary's Social Security Number: _____

New Beneficiary's Date of Birth: _____

Relationship to prior Beneficiary: _____

Section C: Owner Authorization

As Owner of the Tuition Certificates for the above-referenced U.Plan account, I hereby instruct MEFA (Massachusetts Educational Financing Authority) to change the Beneficiary for the account(s) indicated above. I certify that the new Beneficiary is a Qualifying Beneficiary Relative, as outlined in the U.Plan Enrollment Agreement.

Signature of Owner: _____ Date: _____

Please contact MEFA's dedicated U.Plan customer service representatives at 800-449-MEFA (6332), option #1 if you have questions.