

U.Plan Ownership Change Request Form Instructions

In order to process your request to change ownership, please complete the Ownership Change form.

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

- Original death certificate
- Original certificate (with raised seal) of 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 02205-8301

Please contact MEFA's dedicated U.Plan customer service representatives at (800) 449-MEFA (6332) if you have questions or email us at info@mefa.org.

U.Plan Ownership Change Request Form

Section A: Current U.Plan Account Information

Account Number:

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|--|--|--|--|--|--|--|--|--|--|

Owner Name: _____

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: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Primary Phone #: _____ Other Phone #: _____ Email: _____

As the new Owner 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 C: Successor Owner Information (Optional)

You have the option to name a Successor Owner. Any Successor Owner you designate will become the Account owner in the event of your death and will have the right to direct MEFA as to the application of Tuition Certificate proceeds and the right to change the Qualifying Beneficiary. You may remove or change the Successor Owner at any time by contacting MEFA and filling out the applicable form. Please note: The person you designate must be at least 18 years old at the time of your death to be eligible to become the Successor Owner. In the event of reasonable doubt respecting the effectiveness of the Successor Owner designation, MEFA reserves the right, in its sole discretion, to require a judicial determination before effectuating a transfer of the Account to the designated Successor Owner.

Name of Successor Owner: _____

Date of Birth: _____ Social Security Number: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Section D: Owner Authorization and NOTARY PUBLIC (Required)

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: _____

State of: _____ County of: _____

On this ____ day of _____, 20____, before me, the undersigned notary public, personally appeared _____

(name of 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: _____