

U.Plan Successor Owner Form Instructions

In order to process your request to add/change a Successor Owner, please complete the Successor Owner form. 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 Certificates processed and the right to change the Qualifying Beneficiary.

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 Successor Owner Form

Section A: Current U.Plan Account Information

Account Number:

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Owner Name: _____

Current Beneficiary Name: _____

Section B: Successor Owner Instructions

To Add or Change a Successor Owner on your account please complete this form. Select one of the following options:

- Add a Successor Owner on my account** – If you wish to add a Successor Owner on your account please select this option.
- Change the Successor Owner on my account** - If you have designated a Successor Owner on your account and wish to change to a new Successor Owner please select this option.

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 Certificates processed 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

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

Signature of Owner: _____ Date: _____

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