NJBEST 529 College Savings Plan

Transfer Due to Death of Account Owner Form



- Use this form to transfer the Account Ownership (or Custodianship on an UGMA/UTMA account) of a NJBEST 529 College Savings Plan Account due to death.
- Complete this form for each new NJBEST 529 College Savings Plan Account account owner/custodian.

Successor Account Owner/Custodian On File:

The owner/custodian of an individual NJBEST College Savings Plan account is deceased, a Successor Account Owner/Custodian is designated for the account specified, and transfer of ownership is requested by Successor Account Owner/Custodian. Please include death certificate for the deceased Account Owner/Custodian if one is not already on file. **Note:** If your Account is an UTMA/UGMA Account, the Successor Custodian is only acting in this capacity until the Beneficiary has reached the age of termination.

• No Successor Account Owner/Custodian On File:

The owner/custodian of an individual NJBEST 529 College Savings Plan account is deceased, no Successor Account Owner/Custodian is designated, and transfer of ownership is being requested by the executor of the decedent's estate. Please include death certificate for the deceased Account Owner/Custodian as well as executor of estate documentation.



NJBEST.com

Regular mailing address:

NJBEST 529 College Savings Plan PO BOX 55795 Boston, MA 02205

Overnight mailing address:

NJBEST 529 College Savings Plan 95 Wells Avenue, Suite 160 Newton, MA 02459

- If the new Account Owner/Custodian does not already have a NJBEST College Savings Plan Account for the Beneficiary, the new Account Owner/Custodian must establish an account.
 - New accounts can be established online at NJBEST.com or with a mailed Account Application, or if opening an Entity or Trust Account by
 completing the Account Application for an Entity Account, however trust accounts must be opened via a mailed Account Application For
 an Entity Account. Print clearly, preferably in capital letters and black ink.

To request assistance in completing this form call us at (877) 4NJ-BEST, Monday to Friday 8:30 a.m. - 8 p.m. ET.

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