



CollegeInvest Smart Choice College Savings PlanSM A 529 Savings Plan

Designation of Successor Account Owner

In the event of the death or legal incapacity of the Account Owner, you designate the following individual as the Successor Account Owner. If no Successor Account Owner is named below, the Successor Account Owner shall be the Beneficiary. If the Beneficiary becomes the Account Owner and is a minor, his or her parent or legal guardian will need to administer the Plan.

- ◆ You may revoke or change the Successor Account Owner at any time.
- ◆ You can have only one Successor Account Owner per account, and he or she must be a U.S. citizen or resident alien.

Account Information (Please Print)

ACCOUNT OWNER NAME	ACCOUNT OWNER SOCIAL SECURITY OR TAX ID NUMBER
BENEFICIARY NAME	BENEFICIARY SOCIAL SECURITY OR TAX ID NUMBER

I understand that this designation of Successor Account Owner will affect all Smart Choice College Savings Plan Accounts held at FirstBank with the above Account Owner and Beneficiary.

As the Owner, I hereby direct that in the event of my death, legal incompetence or if I cannot be located, all of my rights as the Owner will be transferred to, and all my obligations as Owner will be assumed by, the individual indicated below:

☐ Please check box if this form is completed to replace an already existing Successor Account Owner.

Designation of Successor Account Owner

SUCCESSOR NAME	SOCIAL SECURITY OR TAX ID NUMBER	
ADDRESS	PHONE NUMBER	
CITY	STATE	ZIP CODE

This instruction is intended to become part of my existing Account, and is to supersede any Successor Account Owner previously designated. I understand there may be potential tax and other financial consequences as a result of my rights and obligations being transferred to another Owner.

Authorization

SIGNATURE:

Account Owner

DATE:

Smart Choice College Savings Plans are not insured by CollegeInvest, the State of Colorado, or its agencies. However, these funds are FDIC insured in accordance with the current FDIC coverage limits.

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