



NextGen College Investing Plan[®]

Successor Participant Change Form



INSTRUCTIONS: Complete this form to change or add a Successor Participant to your NextGen Account. This person will become the account owner of the NextGen Account, with all rights and privileges, in the event of your death or incapacity. The Successor Participant must be 18 years or older. Please print clearly. The form must be signed by the Participant (account owner). **Submit your completed and signed change form to: Merrill Lynch, P.O. Box 29002, Hot Springs, AR 71903.**

1. NEXTGEN ACCOUNT INFORMATION

Participant name (Last / First / M.I.)

NextGen Account number

Participant Social Security number or Tax ID

Beneficiary name

Add a new Successor Participant

Change Successor Participant

Eliminate Successor Participant

2. CURRENT SUCCESSOR (IF APPLICABLE)

Please print the name of the person you would like to remove as Successor Participant on your NextGen Account.

Name (Last / First / M.I.)

Please Note: If you have selected Change Successor Participant or Eliminate Successor Participant, the person currently listed on your NextGen Account as Successor Participant (and named above) will be removed from your account.

3. NEW SUCCESSOR PARTICIPANT

Please print the name and Social Security number of the person you would like to name as a Successor Participant.

Name (Last / First / M.I.)

Social Security number

4. SIGNATURE OF PARTICIPANT

Signature of Participant (required)

Date



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