



College Savings Bank Successor Account Owner Designation Form

Mail to:
College Savings Bank
PO Box 3769
Princeton, NJ 08543

call, e-mail or log on for assistance:
1-800-888-2723
info@collegesavings.com
http://www.collegesavings.com

Complete this form to designate or change the successor account owner on your College Savings Bank individual account. If the original account owner dies (and there is no living joint account owner), the successor account owner named on this form will become the account owner. If there is no surviving joint account owner and no successor owner has been designated, the designated beneficiary will become the account owner. The designated beneficiary's custodian will act as account owner on behalf of the designated beneficiary if the designated beneficiary is a minor. An account may only have one successor account owner. A successor account owner must be a U.S. taxpayer. The designation of a successor owner may limit the maximum FDIC insurance coverage on this account.

Account Information:

Account Number		
Account Owner's First Name	MI	Last Name
Social Security Number	Daytime Telephone	
Designated Beneficiary's First Name	MI	Last Name
Social Security Number	Daytime Telephone	

Signature Authorization:

I authorize College Savings Bank as Program Manager, to make the successor account owner designation or change specified in these instructions. I have received, read and agree to the disclosure statement including the account terms and conditions which govern all aspects of this account and are incorporated herein by reference. I certify that the information I have provided with respect to my account is true, complete and accurate. I agree that College Savings Bank and the Program, and their officers, directors, agents and employees will not be liable for any loss, liability, damage or expense for relying upon any instructions believed by me to be genuine.

Account Owner's Signature _____ Date _____

Successor Owner:

Please check one: Designate successor account owner
 Change existing successor account owner

Note: A Signature Guarantee from your bank or credit union is required for all successor account owner designations and/or changes if this form is not sent in with the enrollment form at the time the account is established. Faxes will not be accepted.

Successor Account Owner's First Name	MI	Last Name
Street Address		
City	State	Zip
Social Security Number	Date of Birth	Daytime Telephone

Signature Guarantee