

Quest529 Education Savings Plan Profile Change Form



- Use this form to change: your name, address, phone number, email address, Successor Account Owner/Custodian, Beneficiary Information, Interested Party information or Trusted Contact Person information.
- If you are changing the address on your Account, a hold will be placed on the issuance of any withdrawal until 20 Business Days have passed.
- If you are changing your name you must provide either a legal document such as a copy of a marriage certificate, court document, or copy of a Social Security card; or have your former signature and your new signature Medallion Signature Guaranteed in **Section 8** by an authorized officer of a bank, broker, or other qualified financial institution.
- If you are changing the Account Owner/Custodian or Beneficiary of an existing account, you must complete the **Transfer Form**.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

1.800.579.2203
Monday to Friday 8 a.m. - 7 p.m. CT

www.Quest529.com

Regular mailing address:
**Quest529 Education Savings Plan
P.O. Box 29202
Shawnee Mission, KS 66201-9202**

Overnight mailing address:
**Quest529 Education Savings Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131**

To request assistance in completing this form call us at **1.800.579.2203** Monday to Friday 8 a.m. to 7 p.m. CT.

1. Current Account Owner/Custodian Information

<input type="text"/>	—	<input type="text"/>	<input type="text"/>	—	<input type="text"/>
<input type="text"/>	—	<input type="text"/>	<input type="text"/>	—	<input type="text"/>
<input type="text"/>	—	<input type="text"/>	<input type="text"/>	—	<input type="text"/>

Account Number(s) (To list more than six Accounts, use a separate sheet.)

<input type="text"/>	<input type="text"/>
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Account Owner/Custodian (First name) (M.I.)

Account Owner/Custodian (Last name)

<input type="text"/>	<input type="text"/>
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Joint Tenant Account Owner/Custodian (First name) (M.I.)

Joint Tenant Account Owner/Custodian (Last name)

— —

Telephone Number



* QUEST 5 2 9 P R O F I L E C H A N G E *

8. Signature — YOU MUST SIGN BELOW

I hereby make the changes or additions noted above to my Quest529 Education Savings Plan Account(s). This information replaces any existing information on file with Quest529. I certify the information contained herein is true and correct, and supporting documentation is attached if required. If naming a new Successor Account Owner/Custodian, I certify that the Successor Account Owner/Custodian Social Security Number provided is correct, and that the Successor Account Owner/Custodian is a U.S. citizen or resident alien.

SIGNATURE
Signature of Account Owner/Custodian

□□ — □□ — □□□□
Date (mm-dd-yyyy)

Medallion Signature Guarantee — REQUIRED FOR NAME CHANGES IF LEGAL DOCUMENTATION IS NOT INCLUDED

- You must provide the following information as underwritten certification that your signature is genuine.
- You can obtain a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public cannot provide a Medallion Signature Guarantee, nor can you guarantee your own signature.
- **Do not sign below until you are in the presence of the authorized officer providing the Medallion Signature Guarantee.**
- Please call Quest529 at **1.800.579.2203** if you have any questions concerning this process.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the Quest529 Plan Description and Participation Agreement.

SIGNATURE
Signature of Former Account Owner/Custodian *(if applicable) (In the presence of the authorized officer.)*

SIGNATURE
Signature of Current Account Owner/Custodian *(In the presence of the authorized officer.)*

Signature of Guarantor

Title

Name of Institution

□□ — □□ — □□□□
Date (mm-dd-yyyy)

Authorized Officer to place stamp here