

**Important information about this form:**

- Fill out this form to add, change or remove a Successor Owner from a DreamAhead College Investment Plan (“the Plan”) account.
- The role of the Successor Owner does not apply to UTMA/UGMA accounts.
- A trust must already be established if you want to designate the trust as the Successor Owner.
- The Successor Owner is eligible to inherit the account if the Account Owner dies or becomes incapacitated.
- The Successor Owner must be at least 18 years old. An adult Beneficiary can also be the Successor Owner.

**Need help?**

Give us a call Monday – Friday  
from 6am – 5pm PT at

**1-844-529-5845**

Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.

**Mail the form to:**

DreamAhead College  
Investment Plan  
PO Box 534421  
Pittsburgh, PA 15253- 4421

**Overnight Mail:**

DreamAhead College  
Investment Plan  
Attention: 534421  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262

**Fax:**

833-286-8313

## 1 Account information

\_\_\_\_\_  
Name of Account Owner (First and last)

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_  
Account Owner's Social Security or Taxpayer Identification Number

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_  
Account number (May be 12 or 13 digits)

## 2 Manage Successor Owner information

- Add a Successor Owner
- Change the Successor Owner
- Remove the Successor Owner (Skip to **Step 4**)

## 3 Successor Owner information

Fill out this step to add or change a Successor Owner for this account.

The Successor Owner must be at least 18 years old.

\_\_\_\_\_  
Name (First and last)

\_\_\_\_ / \_\_\_\_ / \_\_\_\_\_  
Date of birth (mm/dd/yyyy)

\_\_\_\_ - \_\_\_\_ - \_\_\_\_\_  
Social Security or Taxpayer Identification Number

## 4 Sign the form

By signing this form, you're confirming the information you've provided is true for the Successor Owner.

\_\_\_\_\_  
Signature of Account Owner

\_\_\_\_\_  
Date (mm/dd/yyyy)