

Important information about this form:

- Fill out this form to change the name of the Account Owner/Custodian or Beneficiary for the DreamAhead College Investment Plan (“the Plan”) account.
- A separate form should be submitted for each individual listed on the account who is changing their name.
- A notarization acknowledgement is required for the Account Owner’s change of name in **Step 4**.
- If the change of name is for the person who owns a bank account connected to the DreamAhead account, you might need to update that bank account information as well by accessing your account online in Settings, or by completing a Manage Bank Account form.
- A notarization acknowledgement is required for an Entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner (**Step 4**).

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 Name change

Who is this change of name for? (Select one)

- Account Owner/Custodian
(A notarization acknowledgement is required to change the Account Owner's name in **Step 4**)
- Beneficiary

Old name (First and last)

New name (First and last)

Reason for change: Marriage Divorce Other: _____

3 Sign the form

By signing this form, you're confirming the information you've provided is true for the change of name.

Signature of Account Owner/Custodian/Authorized Representative
of Entity

Date (mm/dd/yyyy)

4 A notarization acknowledgement is required for a name change

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the Account.

Only sign if you are in the presence of a notary public or other officer providing notarization.

The undersigned has read the foregoing in its entirety before signing. IN WITNESS WHEREOF, I have hereunto

set my hand this _____ day of _____, 20_____.
Day (#) Month Year

Signature of Account Owner/Authorized Representative of Entity

State of _____, County of _____

This instrument was acknowledged before me

physical presence online notarization

on _____
Date (mm/dd/yyyy)

by _____
Name of person (First and last)

My term expires: _____
Date (mm/dd/yyyy)

Notary Public (Seal)

Signature of Notary Public