

**PRIMERICA SHAREHOLDER SERVICES – COVERDELL ESA
CHANGE RESPONSIBLE PARTY FORM**

To Whom It May Concern:

Thank you for your inquiry regarding information related to a changing the responsible party on a Coverdell ESA account.

In response to your request, we have included information required to change the responsible party. Please refer to the chart below to determine the documents that will be required to process your request. Your request will require that you obtain a signature guarantee.

The resigning responsible party must have their signature notarized on the enclosed form or letter of instructions by a notary public before we can process a change to the current account registration.

Documents Required
Notarized letter of Instructions or attached form signed by current/resigning responsible party, to include: <ul style="list-style-type: none">• Account Number• Request to be removed as responsible party and• Naming of new responsible party
New Account Application SB-52 indicating new Coverdell ESA registration (must be obtained and completed by a PFS Representative), and providing new responsible party registration
Customer Identification Form
Certified Copy of beneficial owner's birth certificate as proof that the new responsible party is the parent or, certified copy of appointment of guardianship

Please note a certified copy of the beneficial owner's birth certificate or appointment of guardianship is required, the document must be an Original certified copy (registry certification, court seal or clerk of the court stamp will certify the document) and certification must be dated within 6 months of your request.

If you have questions, need additional information, or need assistance locating a Representative, please contact our Customer Service Department at 1-800-544-5445. Customer Service Representatives are available to assist you, Monday through Friday between 8 a.m. and 8 p.m. ET.

(THIS PAGE RETAINED BY THE NEW RESPONSIBLE PARTY)

**PRIMERICA SHAREHOLDER SERVICES – COVERDELL ESA
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Please mail completed form and required documents to Primerica Shareholder Services, PO Box, 534485, Pittsburgh, PA 15253 – 4485, or for express mail Primerica Shareholder Services, Attention: 534485, 500 Ross Street, 154-0520 Pittsburgh, PA 15262.

You may use the attached form to request a change of the responsible party on an existing Coverdell ESA account. You must provide all the documentation (described in the attached cover letter) requested in order for Primerica Shareholder Services to honor your request.

Please provide the account number so that we may process your request.

SECTION 1 – Please indicate by checking the box that this request is to change the Responsible Party on the account. If you already have an existing account with the new responsible party registered with the exact beneficial owner, please provide the existing account number.

SECTION 2 - SIGNATURE – The resigning responsible party must sign the request in the space provided. Please provide a daytime phone number where you can be reached should we need additional information to process your request.

SECTION 3 - NOTARIZED SIGNATURE – The resigning responsible party must have their signature notarized on the enclosed form or letter of instructions by a notary public before we can process a change to the current account registration.

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Account Number: _____ (Required to complete transaction)

Section 1:

Change Responsible Party (New Account Application Is Required, if no account exist with identical registration).

New Responsible Party Name: _____

Existing Account Number: _____ (with identical registration)

Section 2: Signature

Resigning Responsible Party's Signature _____

Date _____

Daytime phone number where you can be reached should we need additional information: _____

Section 3: Notary Stamp or Seal (Please read instructions)

Notary Stamp or Seal